

Shawnee State Creating a Requisition with Installments

Creating a Requisition with Installments

All Employees

Intro

Purpose: To learn how to create a requisition with multiple payments made throughout a year. How to

Access: Follow the instructions below.

1. Navigate to view your Requisitions by selecting the *Procurement – Purchase Requisitions* tile.



2. From the Requisitions page, select More Tasks - Request Noncatalog Item.

≡ BEAR ÆTR) Purchar	se Purchase		Receipts Catalogs	Suppliers	search Q 🛱 🛱	F 🏓 💿
Requisitions Shop by Category Recent Requisiti		ons Agreement	SRecent Purchases		٩	Request New Supplier Update Preparer and Requester	ns W o Debra Schwamberger 🖌
REQ103860 REQ103831 REQ103828 REQ103756	Office Depot(R) Brand Rubber Bands, #33, 3 1/2 x 1/8, Grepe, 1 Post IJ(R) Notes, 4 x 6, Lined, Marselle, Pack Of 5 Pads Pencie-TEST-DO NOT PROCESS!! MaxiGrip Flexible Tripod Black MATE2005K	Approved Approved Approved Approved	Office Depot(R) Brand Rubber Bands, #33, 3 1/2	Post It/R) Notes, 4 x 6, Lined, Marseille, Pack	MaxiGrip Flexible Tripod Black MATB200BK	Updale Requisition Preferences	
REQ102489	EPSV11H735020 Projector, WUXGA 6000L 43LB LCD 2-5M-1C L	O Approved	\$4.71 BG	\$10.39 PK	\$14.96 EA		



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3. Enter the required fields on the Request screen (Item Description, Category Name, Quantity, UOM Name, Price, Currency, Supplier, Supplier Site).

Create Noncatalog Request							Add to Shopping List	Add to Cart	Done	j∰ 0
* Item Description * Category Name * Category Name * Constitution * UOM Name * Price * Carrency	4 EA •					New supplier TRAVE U.S. INC MARK-PURCH				
Attachments View	• Name or URL	Title	Description	Attached By	Attached Date					

4. After completing the required fields, click Add to Shopping List – Done.

Create Noncatalog Request						Add	to Shopping List	Add to Cart	Done)iii 0
Item Type	Goods or services billed by quantity				New supplier					
* Item Description	Building Funds to be paid quarterly for FY19			* Supplier	TRANE U.S. INC	Q				
				* Supplier Site	MAIN-PURCH	•				
* Category Name	Miscellaneous Q			Supplier Contact		1	•			
* Quantity	4			Phone						
* UOM Name	EA			Fax						
* Price	100.00			Email						
* Currency	USD 🔻			Supplier Item						
	Vegotiated									
Attachments										
View 🔻 🕂 🗙										
Type Category * File	Name or URL	Title	Description	Attached By Attached Date						
No data to display.										

5. The requisition will now appear in *Recent Requisitions* with a status of *Incomplete*. Click on the Requisition number to open/view the Requisition.

Shop by Categor	Search Search				۹.	Requester Debra Sc	wamberger ,
Decent Dequisit	ions	View More	Recent Purchases				
REQ105625	TEST-DO NOT PROCESS!! Example: Building costs. To be billed	Incomplete	0				
REQ103860	Office Depot(R) Brand Rubber Bands, #33, 3 1/2 x 1/8, Crepe, 1	Approved					
REQ103831	Post it(R) Notes, $4\times 6,$ Lined, Marseille, Pack Of 5 Pads	Approved	Office Depot(R) Brand	Post it(R) Notes, 4 x 6,	MaxiGrip Flexible Tripod		
REQ103828	Pencils-TESTDO NOT PROCESS!!!	Approved	Rubber Bands, #33, 3 1/2	Lined, Marseille, Pack	Black MATB200BK		
REQ103756	MaxiGrip Flexible Tripod Black MATB200BK	Approved	\$4.71 BG	\$10.39 PK	\$14.96 EA		
			0	0	0		



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6. With the requisition open, select Actions – Edit.

quisition: REQ	105625				₩ _D So	ocial Check Funds		Actions ▼ Do
Entered By	Shawnee State University BU Debra Schwamberger ESITOO NOT PROCESSII Example: Building costs. To be billed usaterly.	Creation Date 6/26/19 Status Incomplete Justification			Requisition Amount Approval Amount Funds Status	400.00 USD	Duplicate Cancel Requisit Delete Edit Reassign	tion
quisition Lines ctions ▼ View ▼ For	mat 🕶 🥅 Freeze 🔛 Detach 🚽 Wirap				Attachments 1	None	View Document View PDF	t History
	mal v Freeze 🔛 Detach el Virap Description	Category Name	Quantity UOM	Price	Attachments Attach	None Funds Stat	View Document View PDF	LHistory
ctions ▼ View ▼ For			Quantity UOM	Price			View Document View PDF us Order	

7. Within the Edit Requisition page, verify the quantity, price, total amount, suggested buyer (Schwamberger, Debra), and budget code (NOTE: 62101 is default-which is Travel, so it is always wrong). After verifying, click *Save*.

Edit Requisition: REQ105625	Shop Check Funds Manage Approvals View PDF Save 🔻 Submit
Requisitioning BU Shawnee State University BU * Description TEST-DO NOT PROCESSI! Example: Building costs. To be billed quarterly.	Justification Requisition Amount 400.00 USD Approval Amount 400.00 USD Funds Status Not reserved Emergency purchase order number required Attachments None +
Requisition Lines	
Actions View View Format View Format View Freeze Control View Wrap	Category Name [°] Quantity UOM Name Price Amount (USD) Funds Status Delete
TEST-DO NOT PROCESS!! Example: Building costs. To be billed quarterly.	Miscellaneous 4 EA 100.00 USD 400.00 Notreserved 💥
Total	400.00
▲ Line 1: Details ▲ Detivery	Deliver-to Location Type Internal Deliver-to Location Main Campus Q. Deliver-to Address P40 2nd SL PORTSMOUTH, OH 45662, UNITED STATES
* Suggested Buyer Q ▲ Billing View ▼ Format ▼ X ≪ In Freeze In Detach of Wrap Charge Account 10-1010-50-10077-52101-1000 民	* Budget Date * Percentage Quantity Amount (USD) Funds Status Delete 62619 @ 100 4 400.00 Notreserved X
	Total 100 4 400.00



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8. Finally, *Save and Submit* the Requisition. The Requisition should now appear with a *Pending Approval* status under the *Recent Requisitions*. This means that the requisition is now on its way.

Recent Requisi	tions	View More	Recent Purchases	
REQ105625	TEST-DO NOT PROCESS!! Example: Building costs. To be billed	Pending approval	1000	1000
REQ103860	Office Depot(R) Brand Rubber Bands, #33, 3 1/2 x 1/8, Crepe, 1	Approved		
REQ103831	Post it(R) Notes, 4 x 6, Lined, Marseille, Pack Of 5 Pads	Approved	Office Depot(R) Brand	Post it(R) Notes, 4 x 6,
REQ103828	Pencils-TEST-DO NOT PROCESS!!!	Approved	Rubber Bands, #33, 3 1/2 Confirmation	Lined, Marseille, Pack.
REQ103756	MaxiGrip Flexible Tripod Black MATB200BK	Approved	Requisition REQ105625 was	submitted. PK
			View	PDF OK