

## Creating a Requisition with Installments

All Employees

### Intro

**Purpose:**

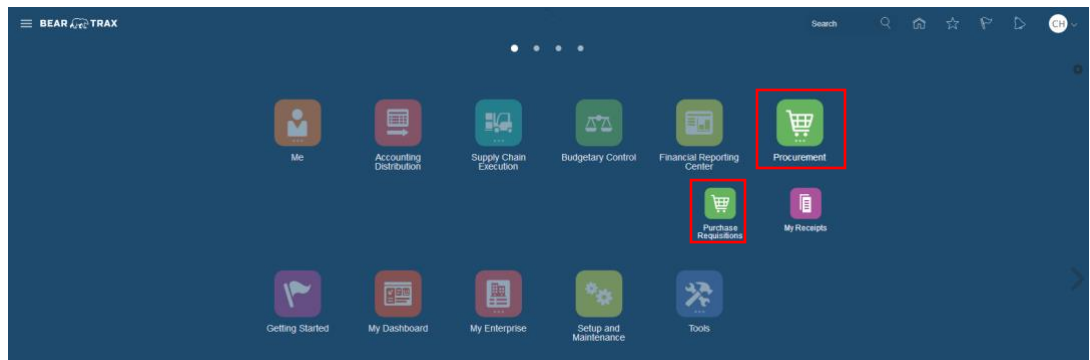
To learn how to create a requisition with multiple payments made throughout a year.

**How to**

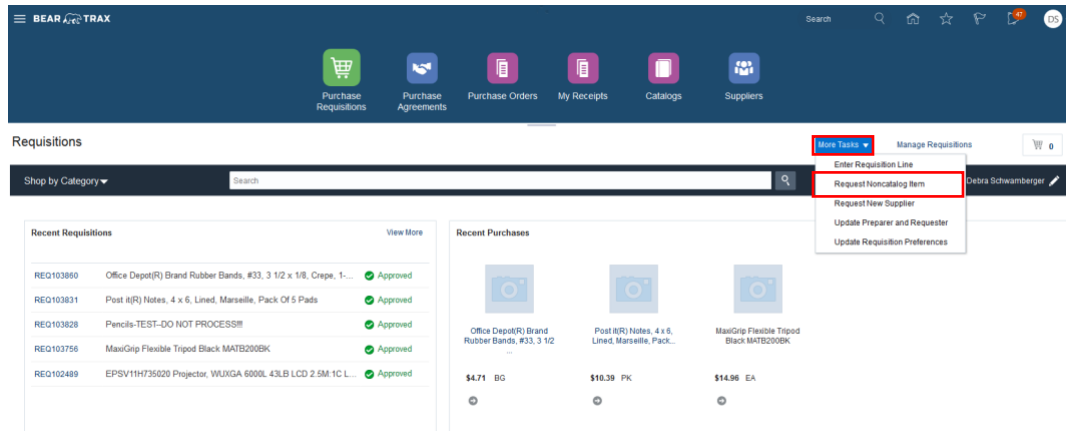
**Access:**

Follow the instructions below.

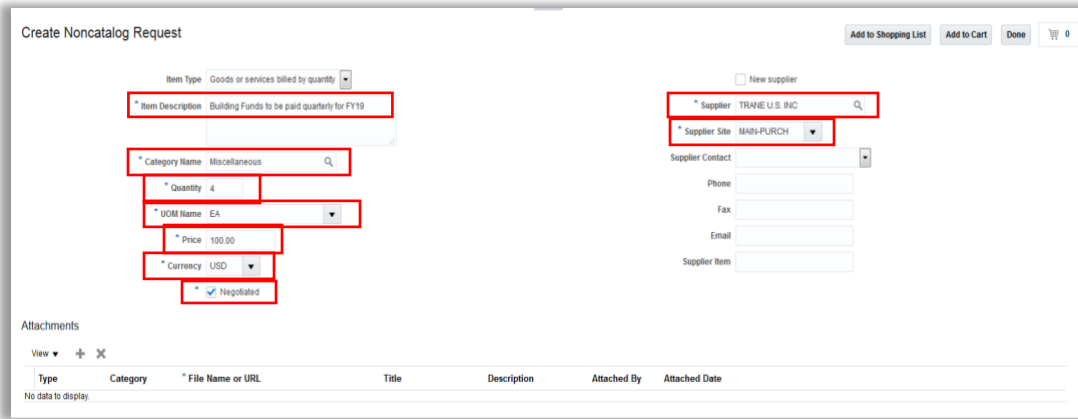
1. Navigate to view your Requisitions by selecting the **Procurement – Purchase Requisitions** tile.



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



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



**Create Noncatalog Request**

Item Type: Goods or services billed by quantity

\* Item Description: Building Funds to be paid quarterly for FY19

\* Category Name: Miscellaneous

\* Quantity: 4

\* UOM Name: EA

\* Price: 100.00

\* Currency: USD

Negotiated

Supplier: TRANE U.S. INC

\* Supplier Site: MAIN-PURCH

Supplier Contact: [Empty]

Phone: [Empty]

Fax: [Empty]

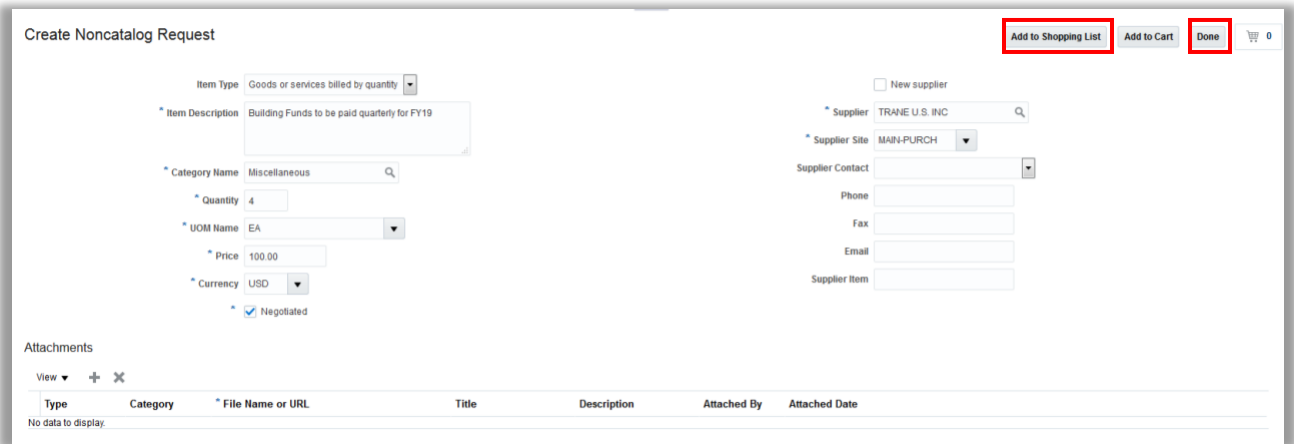
Email: [Empty]

Supplier Item: [Empty]

Attachments:

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

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



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Supplier: TRANE U.S. INC

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Supplier Contact: [Empty]

Phone: [Empty]

Fax: [Empty]

Email: [Empty]

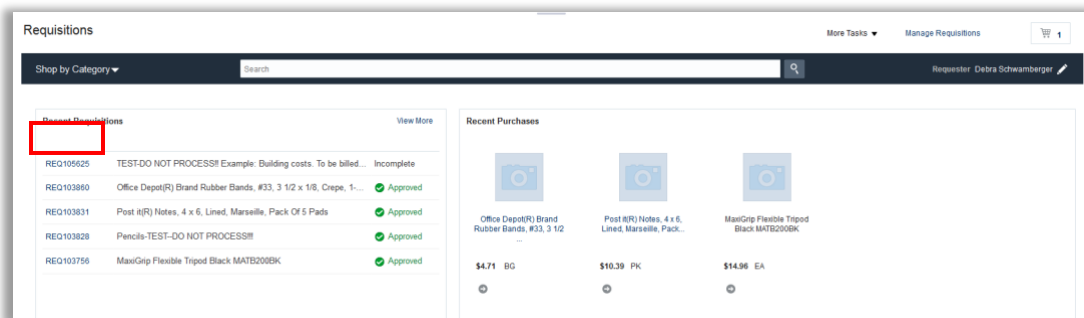
Supplier Item: [Empty]

Attachments:

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

**Add to Shopping List** **Add to Cart** **Done**

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



**Requisitions**

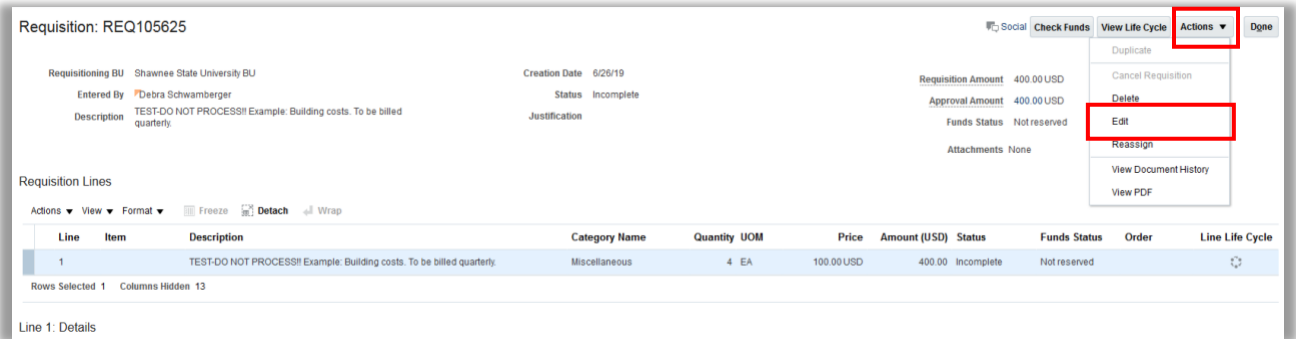
Shop by Category: [Dropdown] Search: [Input] Requester: Debra Schwamberger

Requisition Number	Description	Status
REQ105625	TEST-DO NOT PROCESS! Example: Building costs. To be billed...	Incomplete
REQ103880	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, Marcellite, Pack Of 5 Pads	Approved
REQ103828	Pencils-TEST-DO NOT PROCESS!!	Approved
REQ103756	MaxiGrip Flexible Tripod Black MATB200BK	Approved

Recent Purchases:

Office Depot(R) Brand Rubber Bands, #33, 3 1/2	Post it(R) Notes, 4 x 6, Lined, Marcellite, Pack...	MaxiGrip Flexible Tripod Black MATB200BK
\$4.71 BG	\$10.39 PK	\$14.96 EA

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



Requisition: REQ105625

Requisitioning BU: Shawnee State University BU  
 Entered By: Debra Schwamberger  
 Description: TEST-DO NOT PROCESS!! Example: Building costs. To be billed quarterly.

Creation Date: 6/26/19  
 Status: Incomplete

Requisition Amount: 400.00 USD  
 Approval Amount: 400.00 USD  
 Funds Status: Not reserved  
 Attachments: None

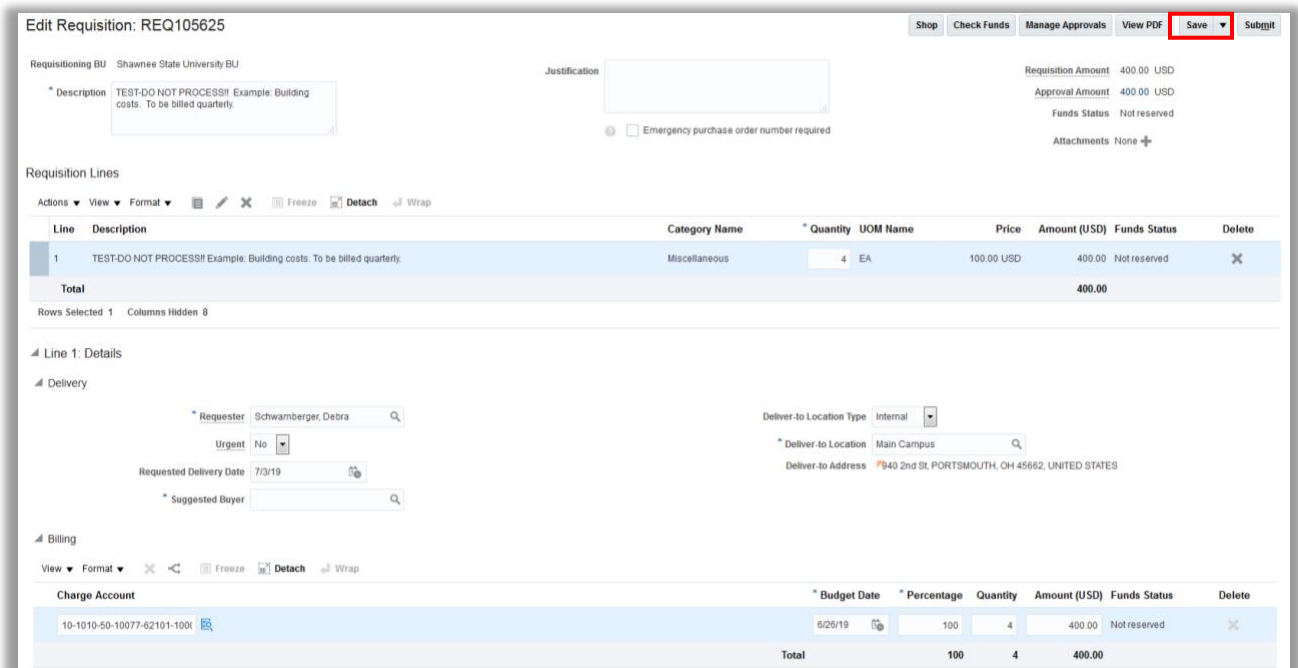
Actions: Duplicate, Cancel Requisition, **Edit**, Reassign, View Document History, View PDF

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1		TEST-DO NOT PROCESS!! Example: Building costs. To be billed quarterly.	Miscellaneous	4	EA	100.00 USD	400.00	Incomplete	Not reserved		

Rows Selected: 1 | Columns Hidden: 13

Line 1: Details

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

Requisitioning BU: Shawnee State University BU

Description: TEST-DO NOT PROCESS!! Example: Building costs. To be billed quarterly.

Justification: [Empty Field]

Emergency purchase order number required:

Requisition Amount: 400.00 USD  
 Approval Amount: 400.00 USD  
 Funds Status: Not reserved  
 Attachments: None

Line	Description	Category Name	Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete
1	TEST-DO NOT PROCESS!! Example: Building costs. To be billed quarterly.	Miscellaneous	4	EA	100.00 USD	400.00	Not reserved	X
<b>Total</b>							<b>400.00</b>	

Rows Selected: 1 | Columns Hidden: 8

Line 1: Details

Delivery

Requester: Schwamberger, Debra  
 Urgent: No  
 Requested Delivery Date: 7/3/19  
 Suggested Buyer: [Empty Field]

Deliver-to Location Type: Internal  
 Deliver-to Location: Main Campus  
 Deliver-to Address: 940 2nd St PORTSMOUTH, OH 45662, UNITED STATES

Billing

Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status	Delete
10-1010-50-10077-62101-100	6/26/19	100	4	400.00	Not reserved	X
<b>Total</b>				<b>400.00</b>		

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.

