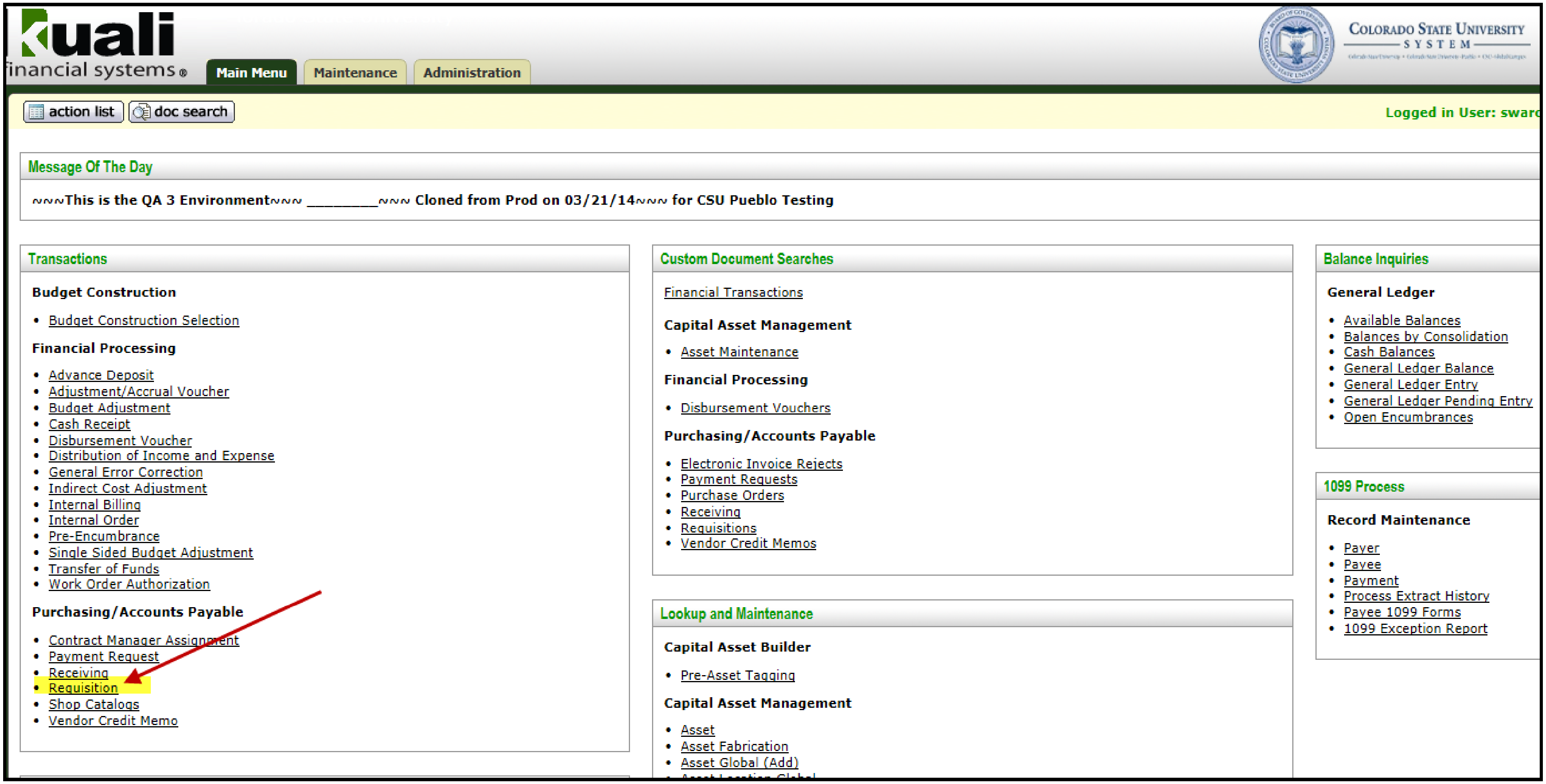
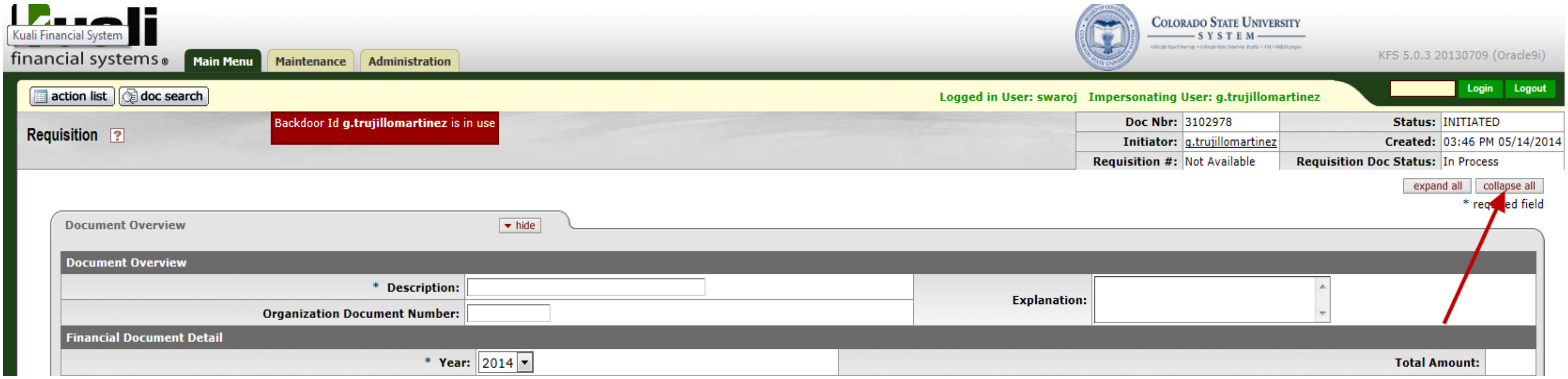
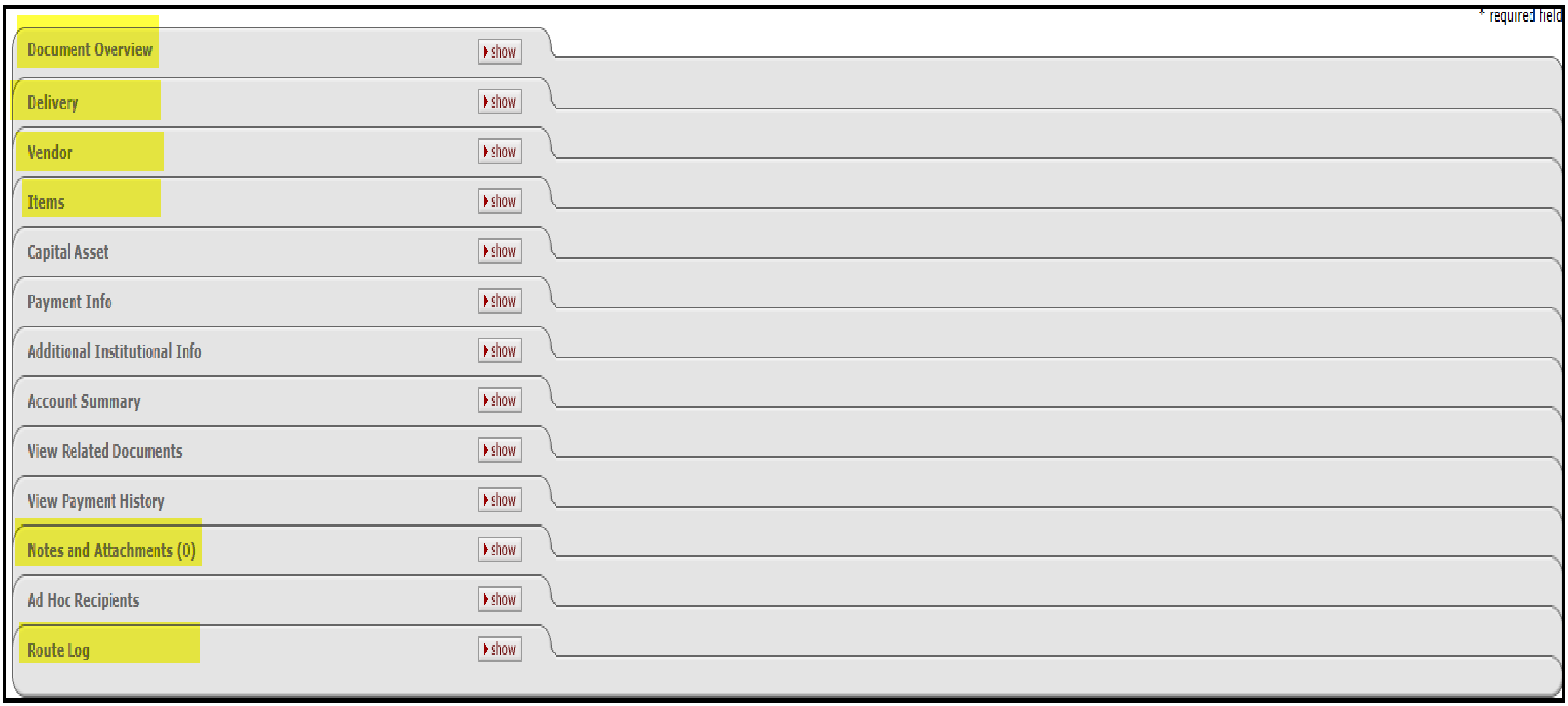


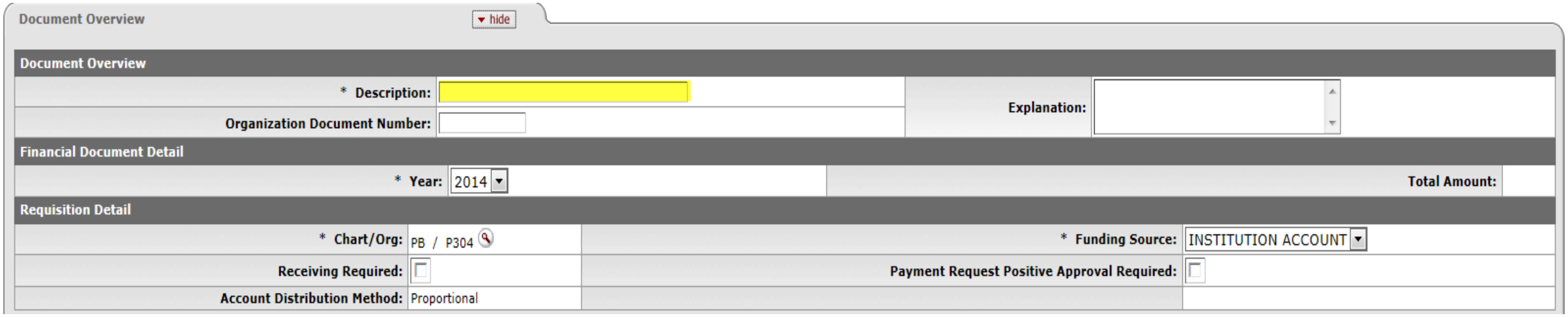
From the Kuali Main Menu, click "Requisition" to start the process of creating a requisition. This Guide covers the tabs that are needed to create a requisition. When creating requisitions in Kuali the first five tabs will be open for input.



The requisition document initially opens with the appropriate tabs expanded that have fields where data entry is required. The user may click the "expand all" button or the "collapse all" button to show or hide all tabs.

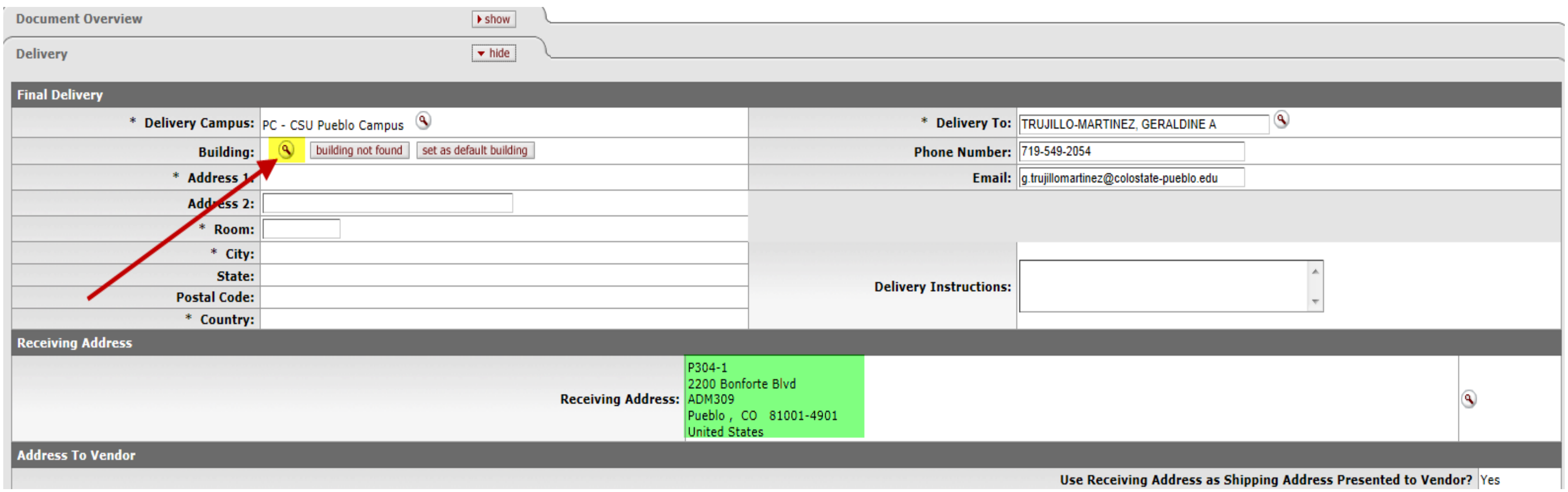


Document Overview Tab



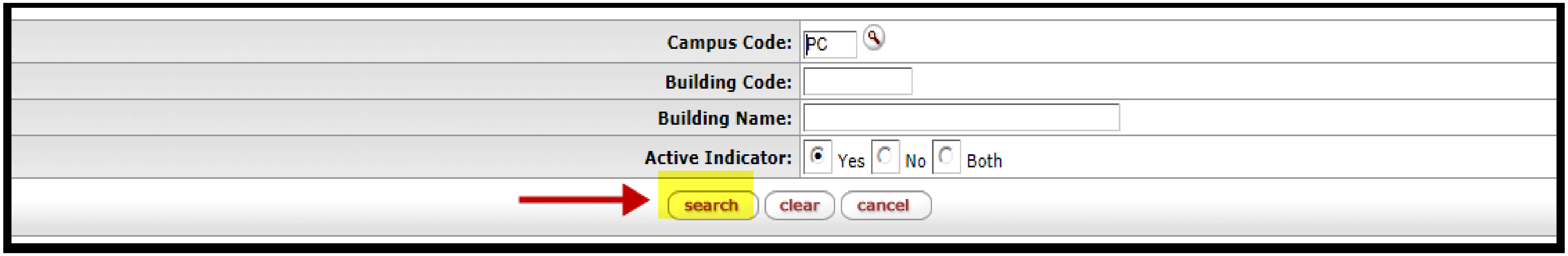
This is a required field for all requisitions. Any field that is marked with an asterisk is a required field. For requisitions over $5000, the description field will be changed to reflect the last name of the Purchasing Agent assigned the requisition.

Delivery Tab

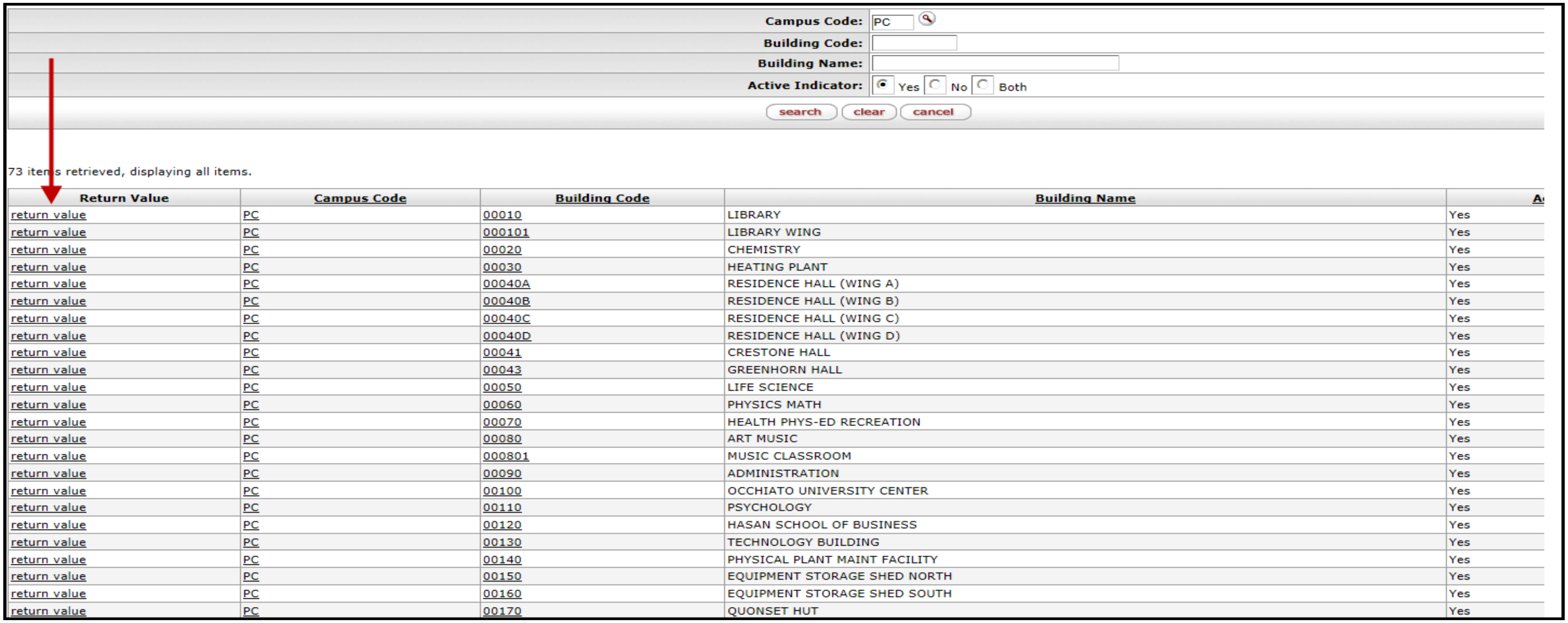


The first time you create a requisition, you will need to set your default final delivery address. To do so, click on the magnifying glass next to Building. The magnifying glass allows searching in all of the Kuali screens. Information highlighted

in green is automatically populated from user's organization code. This receiving address is then populated on the purchase order transmitted to the vendor for delivery.



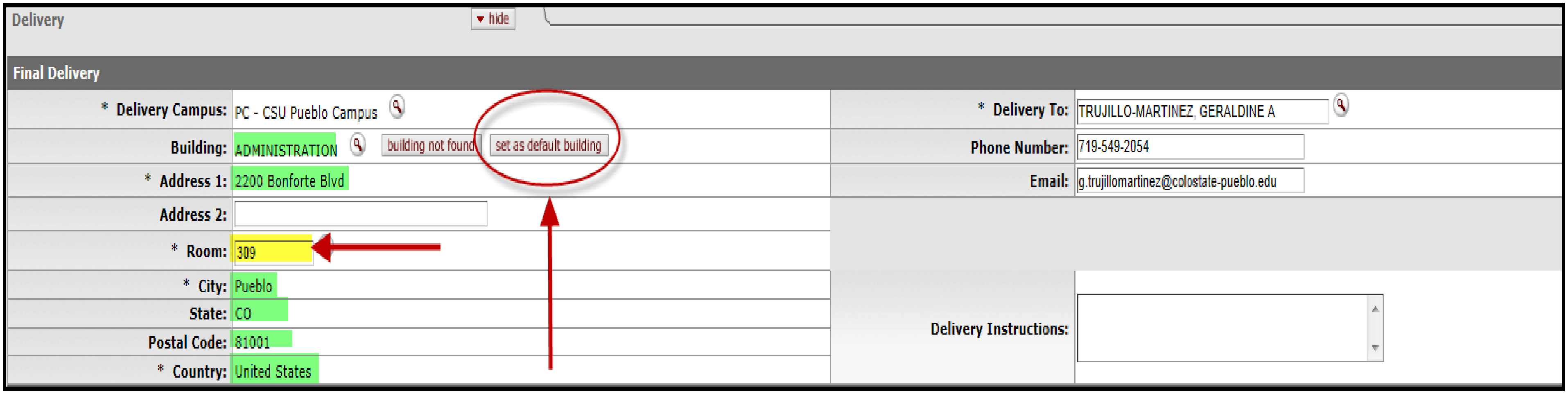
This is the screen you will see after clicking on the magnifying glass. Click "search."


Campus Code: PC
Building Code:
Building Name:
Active Indicator: Yes No Both
search clear cancel

73 items retrieved, displaying all items.

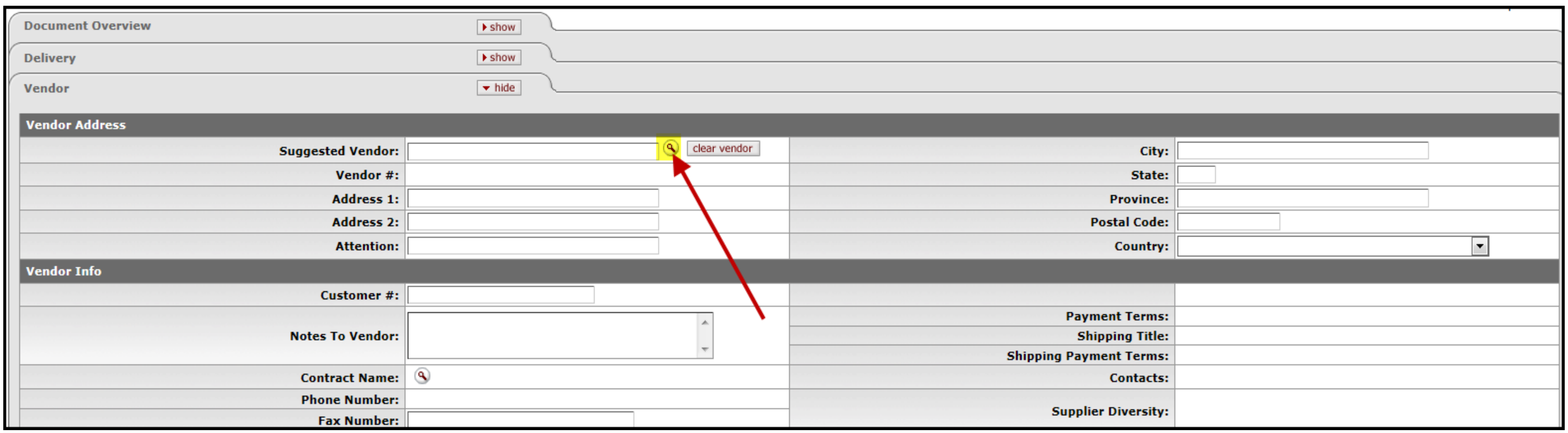
Return Value	Campus Code	Building Code	Building Name	A
return value	PC	00010	LIBRARY	Yes
return value	PC	000101	LIBRARY WING	Yes
return value	PC	00020	CHEMISTRY	Yes
return value	PC	00030	HEATING PLANT	Yes
return value	PC	00040A	RESIDENCE HALL (WING A)	Yes
return value	PC	00040B	RESIDENCE HALL (WING B)	Yes
return value	PC	00040C	RESIDENCE HALL (WING C)	Yes
return value	PC	00040D	RESIDENCE HALL (WING D)	Yes
return value	PC	00041	CRESTONE HALL	Yes
return value	PC	00043	GREENHORN HALL	Yes
return value	PC	00050	LIFE SCIENCE	Yes
return value	PC	00060	PHYSICS MATH	Yes
return value	PC	00070	HEALTH PHYS-ED RECREATION	Yes
return value	PC	00080	ART MUSIC	Yes
return value	PC	000801	MUSIC CLASSROOM	Yes
return value	PC	00090	ADMINISTRATION	Yes
return value	PC	00100	OCCHIATO UNIVERSITY CENTER	Yes
return value	PC	00110	PSYCHOLOGY	Yes
return value	PC	00120	HASAN SCHOOL OF BUSINESS	Yes
return value	PC	00130	TECHNOLOGY BUILDING	Yes
return value	PC	00140	PHYSICAL PLANT MAINT FACILITY	Yes
return value	PC	00150	EQUIPMENT STORAGE SHED NORTH	Yes
return value	PC	00160	EQUIPMENT STORAGE SHED SOUTH	Yes
return value	PC	00170	QUONSET HUT	Yes

Find your building and click "return value."



Enter your room number and click "set as default building." You will not need to set your default address again.

Vendor Tab



Search for a vendor by clicking on the magnifying glass.

Vendor Name:	hilton*
Tax Number:	
Vendor #:	
Active Indicator:	Yes No Both
Vendor Type:	PO - PURCHASE ORDER
State:	
Commodity Code:	
Supplier Diversity:	

search clear cancel

For best results, use an asterisk before and after the vendor name. After inputting the vendor's name, click "search."

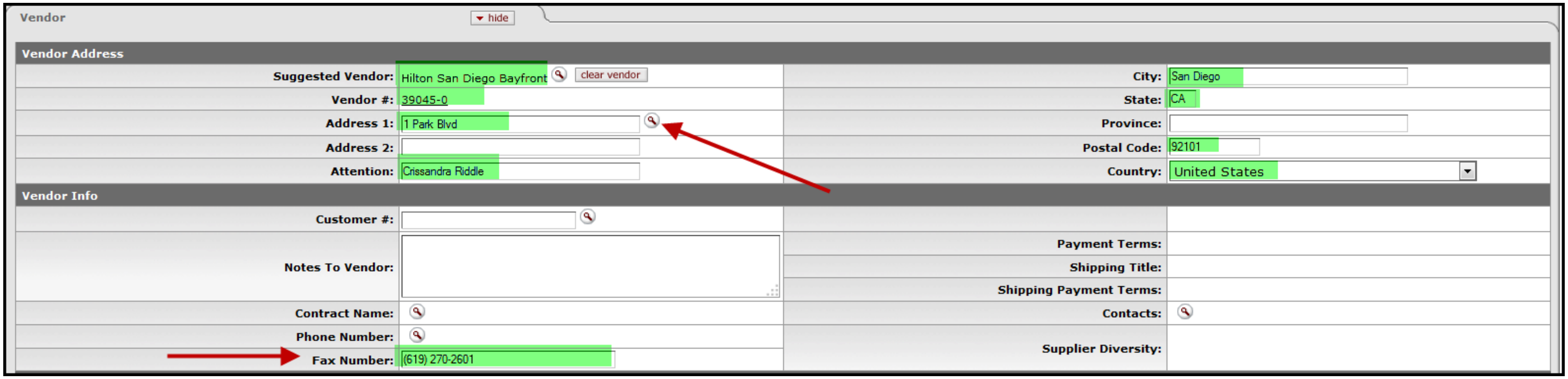
Vendor Name:	hilton*
Tax Number:	
Vendor #:	
Active Indicator:	Yes No Both
Vendor Type:	PO - PURCHASE ORDER
State:	
Commodity Code:	
Supplier Diversity:	

search clear cancel

14 items retrieved, displaying all items.

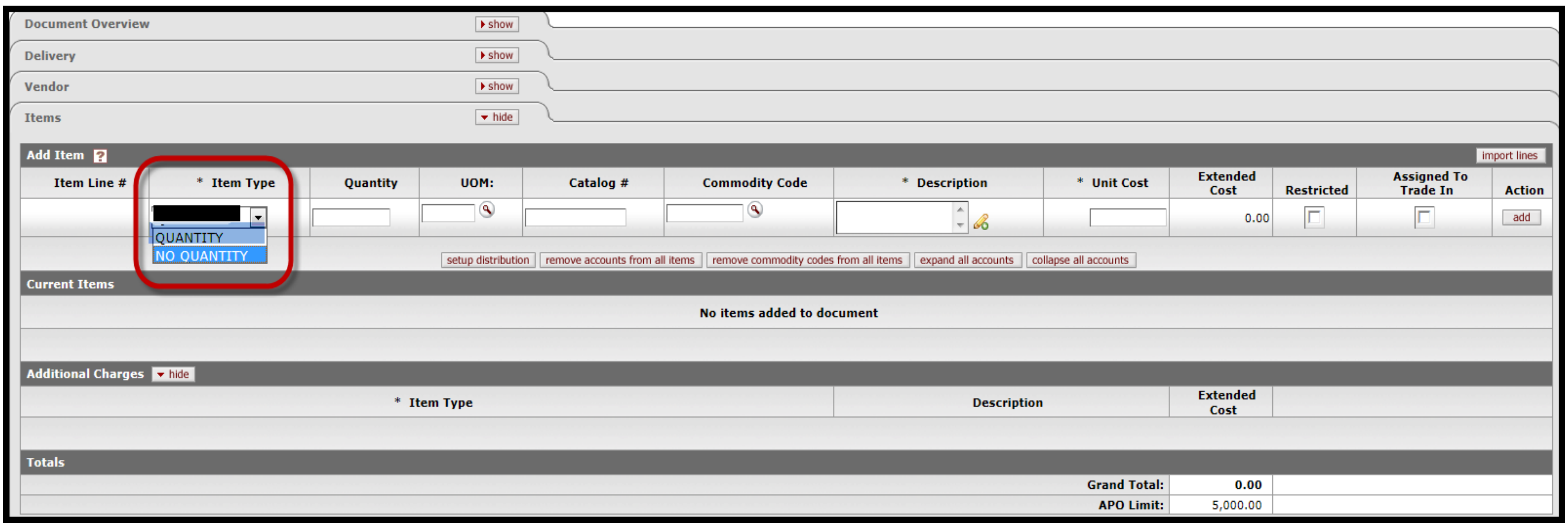
Return Value	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commodity Codes	Vendor Supplier Diversity
return value	Hilton Long Beach	HEI Hospitality Fund Holding	25540-0	Yes	PO	CALIFORNIA		
return value	Hilton Austin Convention Hotel	AUSTIN CONVENTION ENTERPRISES	41840-0	Yes	PO	TEXAS		
return value	Hilton Birmingham	Noble Interstated Mgmt Group LLC	44225-0	Yes	PO	ALABAMA		
return value	Hilton Fort Collins	Atrium Finance I V	37064-0	Yes	PO	COLORADO		
return value	HILTON FORT LAUDERDALE MARINA	China Grill FTL LLC W H M LLC	31392-0	Yes	PO	FLORIDA		
return value	Hilton Garden Inn Denver Downtown		43273-0	Yes	PO	COLORADO		
return value	Hilton Head ER Physicians		19210-0	Yes	PO	OHIO		
return value	Hilton Head Rentals And Golf	HILTON HEAD RENTALS AND GOLF	7692-0	Yes	PO	SOUTH CAROLINA		
return value	Hilton New Orleans Riverside		35606-0	Yes	PO	LOUISIANA		
return value	HILTON PHOENIX CHANDLER	texas Western Mgmt Partnership	32823-0	Yes	PO	ARIZONA		
return value	Hilton San Diego Bayfront	Sunstone Park Lessee LLC	39045-0	Yes	PO	CALIFORNIA		
return value	Hilton Santa Fe Buffalo Thunder	Buffalo Thunder	42582-0	Yes	PO	NEW MEXICO		
return value	Hilton Santa Fe Historic Plaza	Ashford TRS Sapphire LLC	39016-0	Yes	PO	NEW MEXICO		
return value	HILTON TULSA SOUTHERN HILLS	BRISAM TULSA LLC	36794-0	Yes	PO	OKLAHOMA		

After clicking on the magnifying glass, this is what you will see if there are multiple vendors. Click "return value" on the vendor you need.



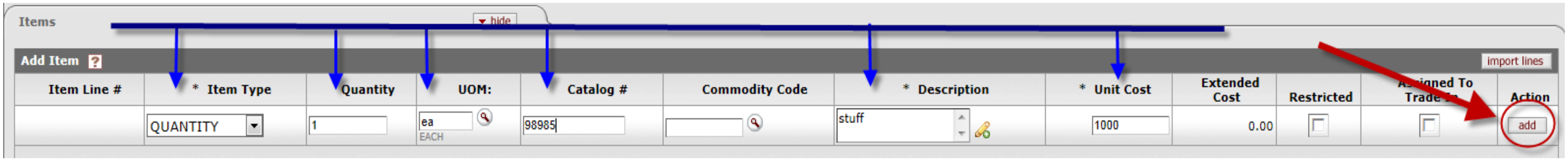
The vendor selected will auto populate the fields on the requisition. User can click on magnifying glass on Address 1 to choose a different address for selected vendor. Select from the available PO addresses. Check the fax number to make sure the fax number is correct. The system will fax the purchase order to the vendor using this number.

Items Tab



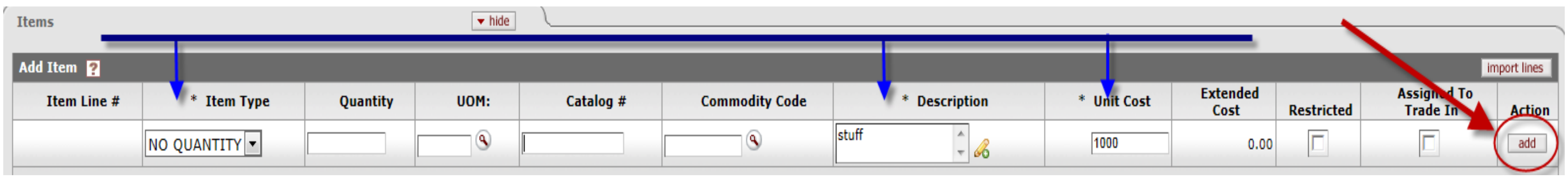
"Quantity" requisitions are used for goods only. "No Quantity" requisitions are used for open and service purchase orders where multiple invoices are expected.

"Quantity"

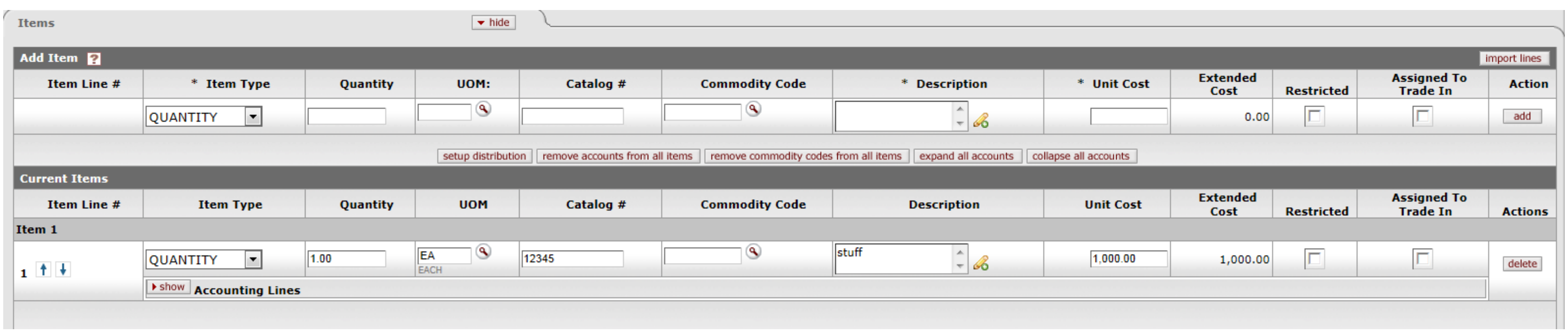


"Quantity" requisitions are to be used for goods only. You must enter each item as it appears on your quote. You must input a Quantity, UOM, Catalog #, Description, and Unit Cost. The Commodity Code field must be left blank. Remember to click the "add" button to save your requisition line. (Note: Electronic receiving in KFS is required for all "Quantity" POs greater than $5,000.00)

"No Quantity"

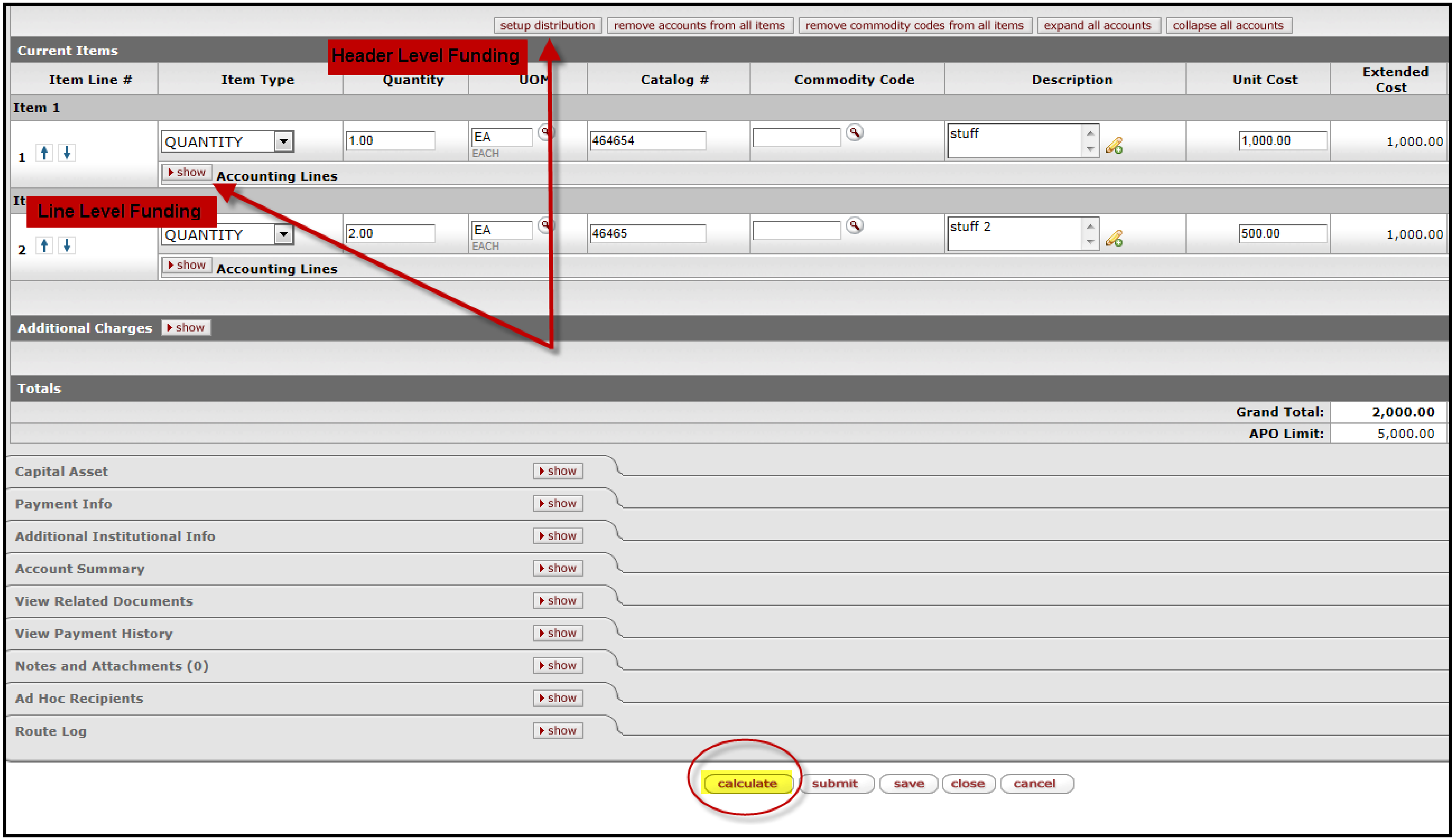


"No Quantity" requisitions are used for open and service purchase orders, where multiple invoices are expected. Only Description and Unit Cost are required on a no quantity requisition. Do not input anything in the Quantity, UOM, or Catalog # fields. Remember to click the "add" button to save the line to the requisition.



When the "add" button is clicked, the requisition line is saved and an "Add Item" box opens for Line 2 above Line 1. "Add Item" box will appear after each line is added. If there is only 1 line to your requisition, leave "Add Item" box blank.

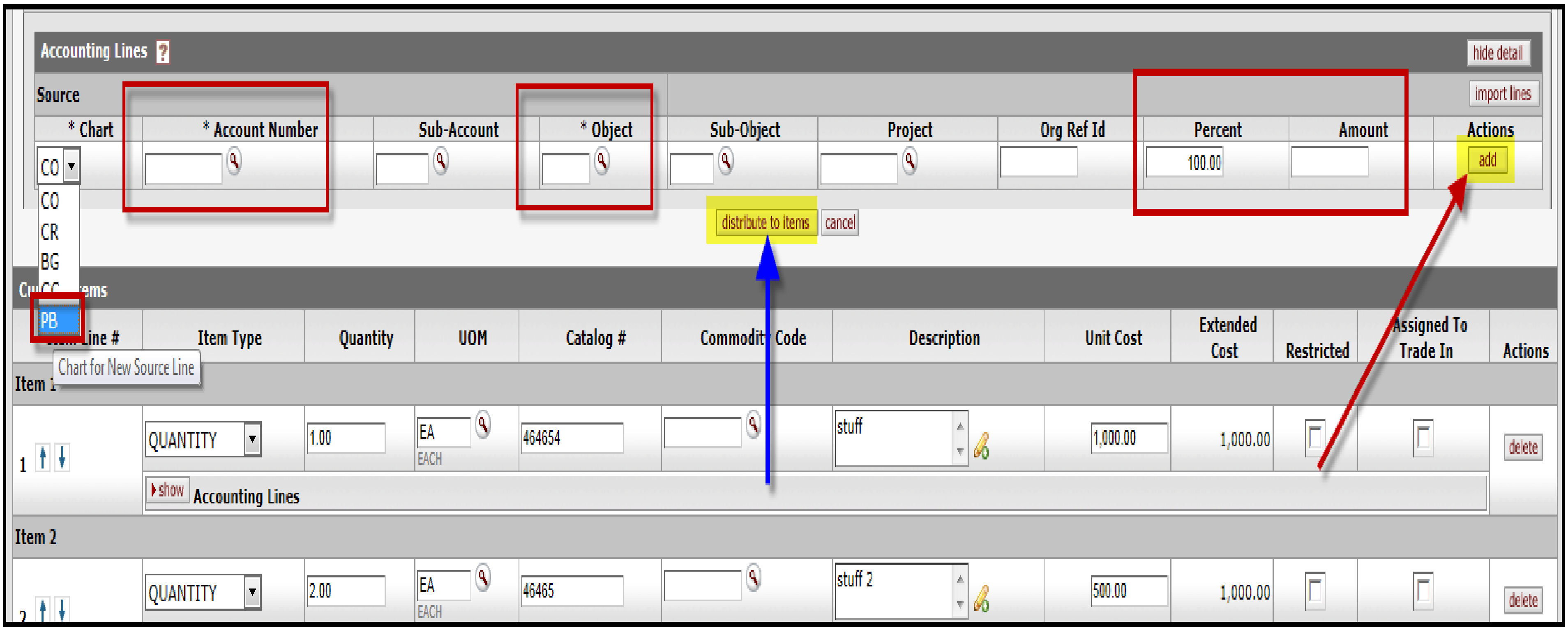
<u>"Funding"</u>



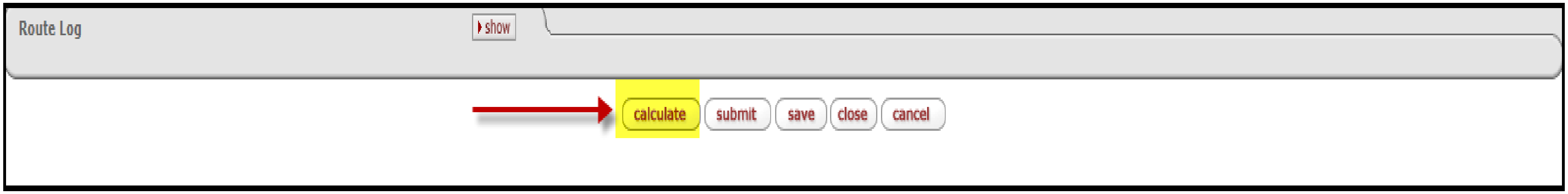
After all lines have been added to the requisition, the lines require accounting information. There are two ways to apply account and object code funding to requisition lines, Header Level funding or Line Level funding.

Header Level funding allows funding to be applied to all lines of the requisition. To start Header Level funding, click the "setup distribution" button. Line Level funding allows funding to be applied individually to each line of the requisition. Click the "show" button next to "Accounting Lines." User will do this for each line of the requisition for Line Level funding. When funding has been added to the requisition lines, user must click "calculate" at the bottom of the requisition document.

Header Level Funding

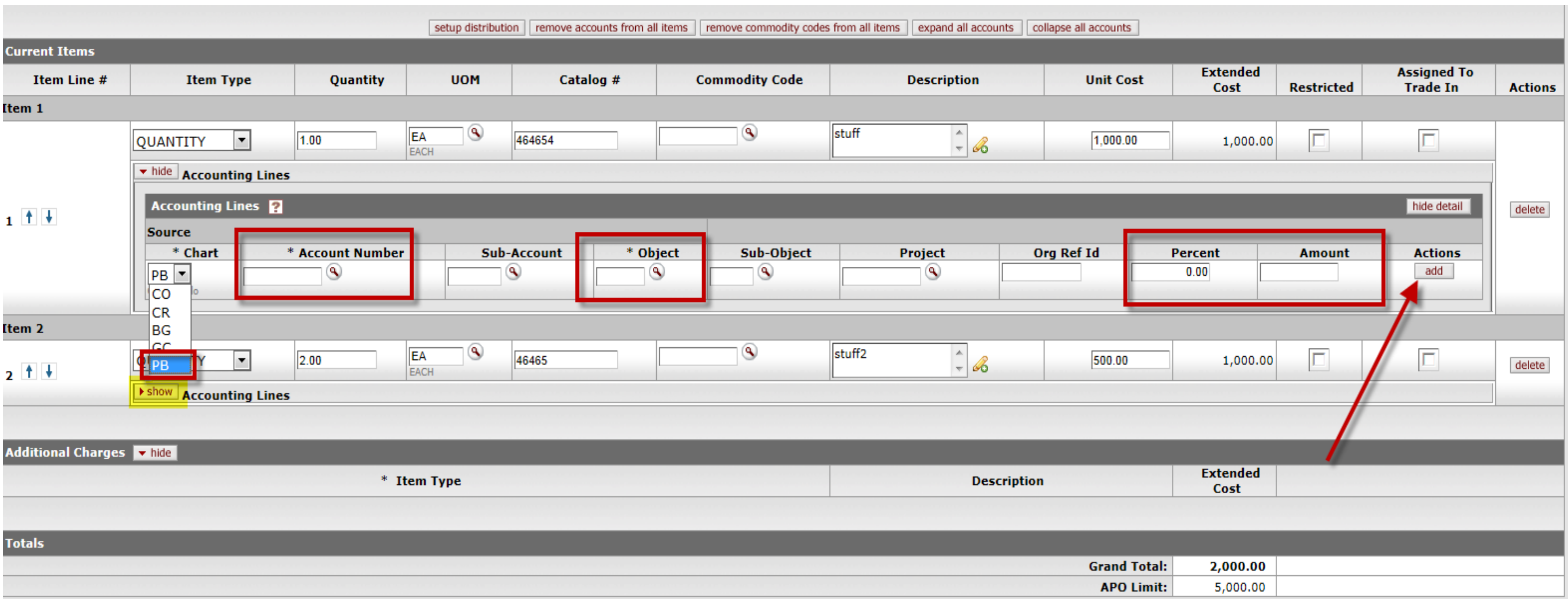


After clicking "setup distribution", "Accounting Lines" will appear. Select "PB" from the dropdown box under Chart. Enter the Account Number, Object Code, Percent or dollar Amount and click "add". You can add multiple Header accounting lines but the Percent must equal 100 or the Amount must equal the requisition total. Click "distribute to items" when you have finished adding your accounting lines.

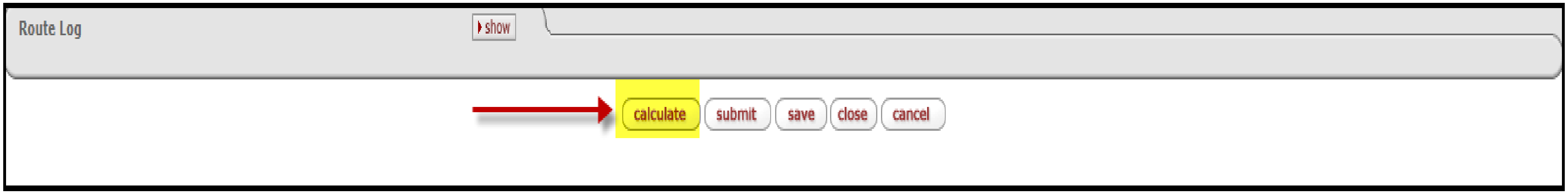


Remember to click "calculate" at the bottom of requisition before clicking "save" or submit".

Line Level Funding

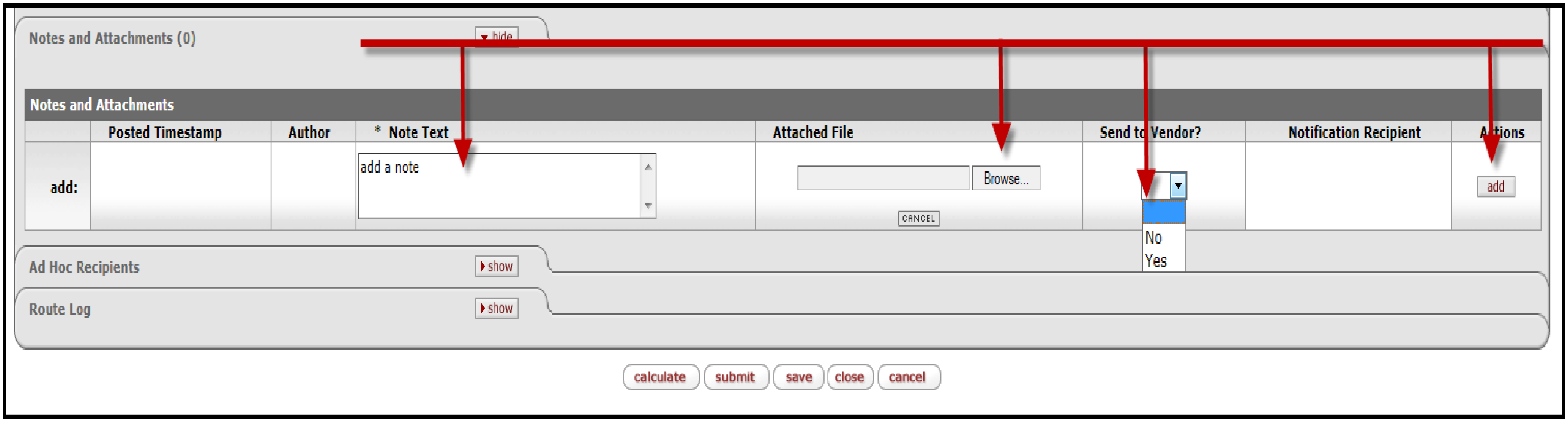


For funding at the line, click the "show" button next to "Accounting Lines." You will need to do this for each line of the requisition for Line Level funding. Select "PB" from the dropdown box under Chart. Enter the Account Number, Object Code, Percent or dollar Amount and click "add". You can add multiple Line Level accounting lines but the Percent must equal 100 or the Amount must equal the line total. Each line of requisition must have an account and object code.



Remember to click "calculate" at the bottom of requisition before clicking "save" or submit".

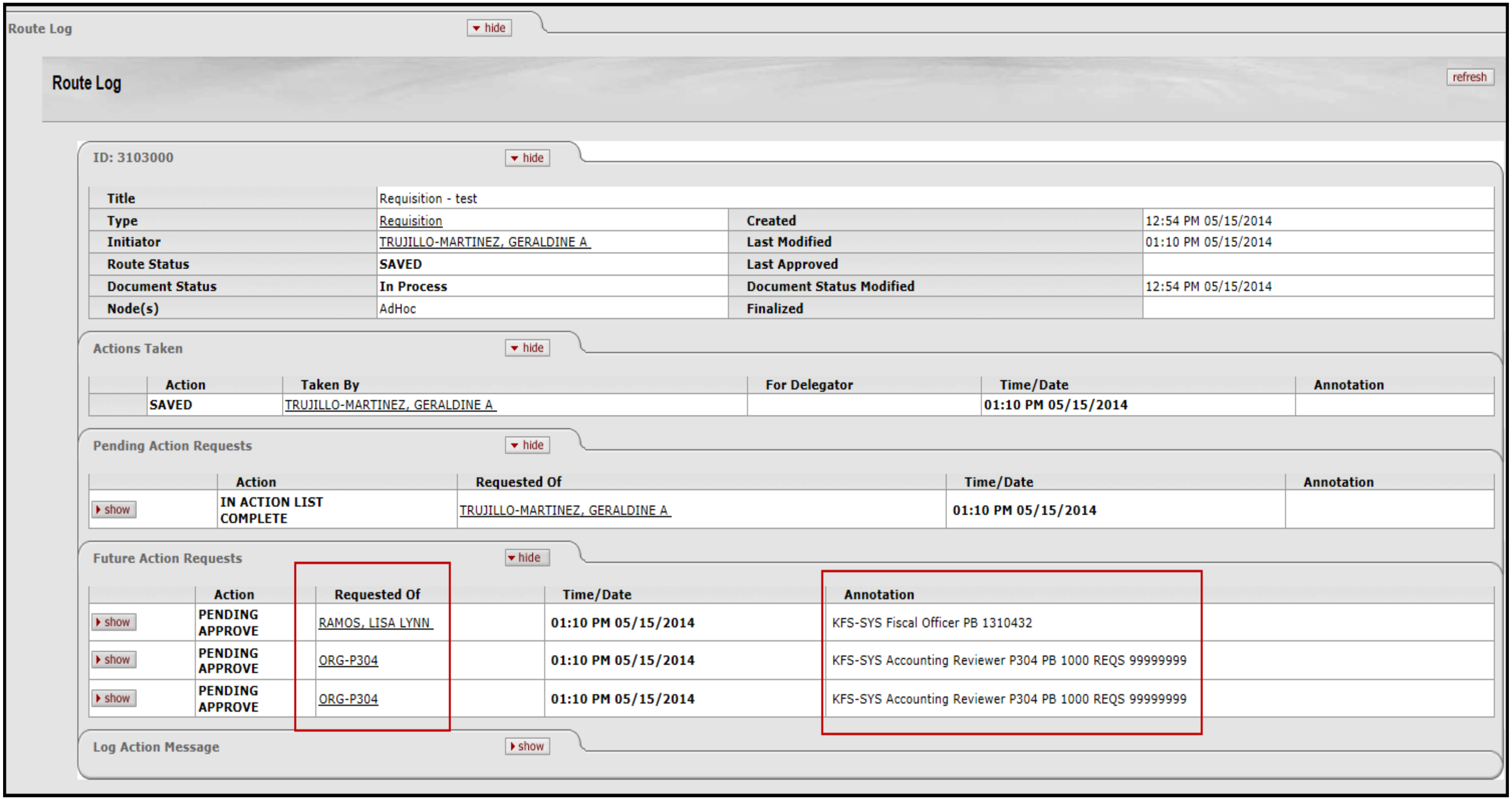
Notes and Attachments Tab



Notes and Attachments can be used to add a quote or note for the vendor or Purchasing Agent. Note Text must be entered anytime an attachment is added to a requisition. To attach a file, click on "Browse" under Attached File and go to the location of where the file is saved. If you want a note or quote to be sent to the vendor, select "Yes" from the drop down menu. Click "add" to attach the note or attachment.

Route Log Tab

In order to see who will need to approve the requisition before a purchase order is created the requisition must be saved. Click "save" at the bottom of the requisition document. The Route Log tab shows which individuals need to approve the requisition before a purchase order is created.



Route Log

Route Log

ID: 3103000

Title	Requisition - test		
Type	Requisition	**Created**	12:54 PM 05/15/2014
Initiator	TRUJILLO-MARTINEZ, GERALDINE A	**Last Modified**	01:10 PM 05/15/2014
Route Status	**SAVED**	**Last Approved**	
Document Status	**In Process**	**Document Status Modified**	12:54 PM 05/15/2014
Node(s)	AdHoc	**Finalized**	

Actions Taken

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	TRUJILLO-MARTINEZ, GERALDINE A		**01:10 PM 05/15/2014**	

Pending Action Requests

	Action	Requested Of	Time/Date	Annotation
show	**IN ACTION LIST COMPLETE**	TRUJILLO-MARTINEZ, GERALDINE A	**01:10 PM 05/15/2014**	

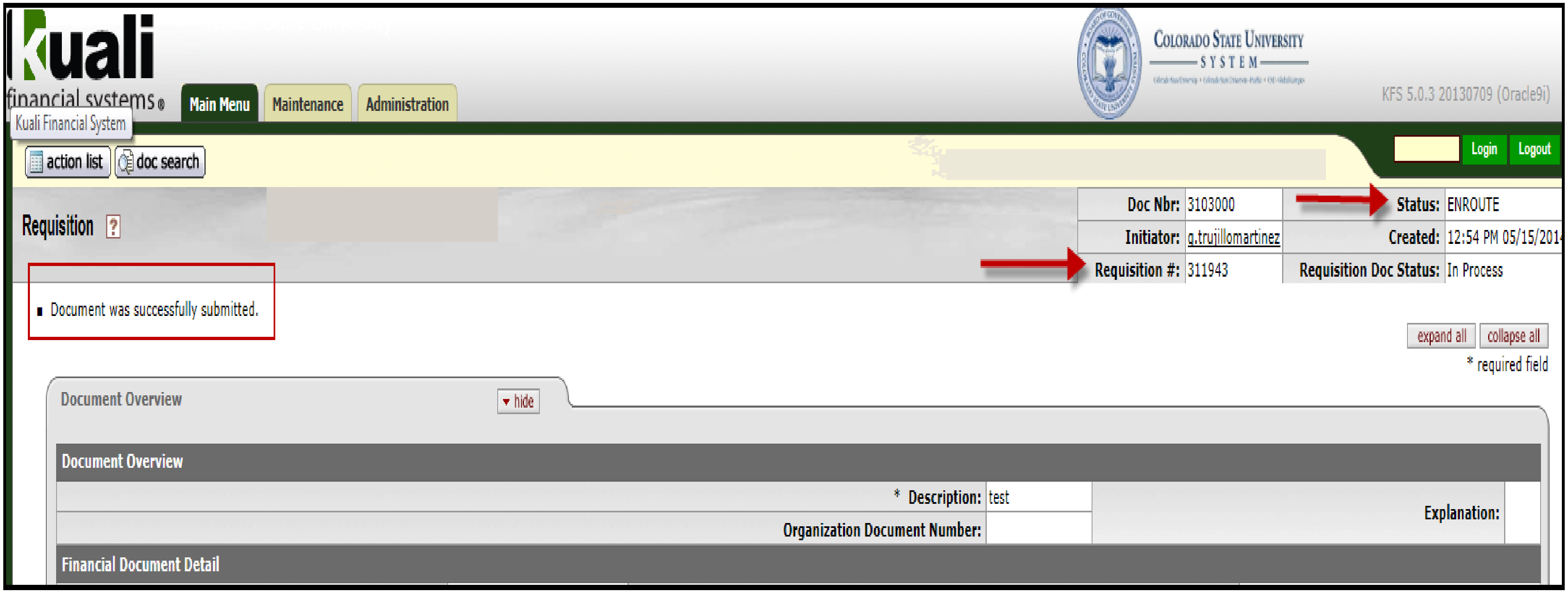
Future Action Requests

	Action	Requested Of	Time/Date	Annotation
show	**PENDING APPROVE**	RAMOS, LISA LYNN	**01:10 PM 05/15/2014**	KFS-SYS Fiscal Officer PB 1310432
show	**PENDING APPROVE**	ORG-P304	**01:10 PM 05/15/2014**	KFS-SYS Accounting Reviewer P304 PB 1000 REQS 99999999
show	**PENDING APPROVE**	ORG-P304	**01:10 PM 05/15/2014**	KFS-SYS Accounting Reviewer P304 PB 1000 REQS 99999999

Log Action Message

Click "show" on the Route Log, and then click "show" on Future Action Requests. Once the requisition is submitted, electronic workflow will route the requisition to various reviewers in the system. Reviewers will be listed in the Requested Of column of the Future Action Requests.

When requisition is complete, click the "submit" button to start the workflow approval process for your document.



When the document is successfully submitted, the screen will refresh to the top and show the status of the document as <u>ENROUTE</u>. The document will route to the approvals needed to create a purchase order. The document is also assigned a requisition number.