

KFS Shop Catalogs

Overview

Profile Setup

Hosted Catalog Searches

Punch-out Catalog Searches

PO History Lookup

Print PO Fax Version

Overview

The screenshot displays the Quali Financial System interface. At the top left, the logo for Quali Financial System is visible. The top right features the Colorado State University logo and the text "COLORADO STATE UNIVERSITY SYSTEM" along with the version "KFS 5.0.3 20130709 (Oracle9i)". Below the header, there are navigation tabs for "Main Menu", "Maintenance", and "Administration". A yellow bar contains "action list" and "doc search" buttons, followed by a search input field and "Login" and "Logout" buttons. The main content area is divided into several sections:

- Message Of The Day**: A placeholder for a daily message.
- Transactions**:
 - Budget Construction**:
 - Budget Construction Selection
 - Financial Processing**:
 - Advance Deposit
 - Adjustment/Accrual Voucher
 - Budget Adjustment
 - Cash Receipt
 - Disbursement Voucher
 - Distribution of Income and Expense
 - General Error Correction
 - Indirect Cost Adjustment
 - Internal Billing
 - Internal Order
 - Pre-Encumbrance
 - Single Sided Budget Adjustment
 - Transfer of Funds
 - Work Order Authorization
 - Purchasing/Accounts Payable**:
 - Contract Manager Assignment
 - Payment Request
 - Receiving
 - Requisition** (highlighted with a red arrow)
 - Shop Catalogs
 - Vendor Credit Memo
- Custom Document Searches**:
 - Financial Transactions
 - Capital Asset Management**:
 - Asset Maintenance
 - Financial Processing**:
 - Disbursement Vouchers
 - Purchasing/Accounts Payable**:
 - Electronic Invoice Rejects
 - Payment Requests
 - Purchase Orders
 - Receiving
 - Requisitions
 - Vendor Credit Memos
- Lookup and Maintenance**:
 - Capital Asset Builder**:
 - Pre-Asset Tagging
 - Capital Asset Management**:
 - Asset
 - Asset Fabrication
 - Asset Global (Add)
- Balance Inquiries**:
 - General Ledger**:
 - Available Balances
 - Balances by Consolidation
 - Cash Balances
 - General Ledger Balance
 - General Ledger Entry
 - General Ledger Pending Entry
 - Open Encumbrances
- 1099 Process**:
 - Record Maintenance**:
 - Payer
 - Payee
 - Payment
 - Process Extract History
 - Payee 1099 Forms
 - 1099 Exception Report

From the Quali Main Menu, click “Shop Catalogs” to begin shopping over 25 vendor catalogs.

The screenshot shows the Kuali financial systems interface. At the top left is the Kuali logo with the text 'financial systems'. To its right are navigation tabs: 'Main Menu', 'Maintenance', and 'Administration'. Further right is the Colorado State University logo and the text 'COLORADO STATE UNIVERSITY SYSTEM'. In the top right corner, it says 'KFS 5.0.3 20130709 (Oracle9i)'. Below the header is a yellow bar with 'action list' and 'doc search' buttons. A dark green bar contains the user name 'GERALDINE A TRUJILLO-MARTINEZ', a star icon, 'Action Items', 'Notifications', a shopping cart icon with '0.00 USD', and a search icon. The main content area has a breadcrumb trail: 'Shop > Shopping > Dashboard > Shopping Home > Home/Shop'. Below this is a search bar with 'Shop' and a dropdown menu set to 'Everything', followed by a 'Go' button. Underneath the search bar are links: 'Go to: advanced search | favorites | quick order' and 'Browse: suppliers | categories | contracts'. On the left side, there is a box that says 'This is the TEST Environment!'. The main content area is divided into three sections: 'Lab Supply/Equipment Catalogs' with logos for BIO-RAD, Fisher Scientific, SIGMA-ALDRICH, and VWR INTERNATIONAL; 'Office/Computer Catalogs' with logos for BH, CSU Bookstore Office Supply Center, OfficeMax, and ZUNESIS; and 'Furniture Catalogs' with the logo for COLORADO.

The KFS Shop Catalogs link provides user the unique opportunity to shop and create requisitions using over 25 vendor catalogs. The shopping experience is similar to online shopping at Amazon. The catalogs are provided as a tool to assist the user in procuring office supplies, technology, scientific, and furniture related goods without using a PCard. The catalogs contain Colorado State University specific pricing contracts.

When shopping is complete, a “shopping cart” of selected goods is returned to Kuali and cart information is auto populated into the requisition. Accounting information must be input in order to complete the requisition creation process.

List of Vendor Catalogs in KFS Shop Catalogs

Hosted Catalogs

Airgas Intermountain
Bio Express Corp
Ebiosciences
Fisher Scientific
Life Science Products (Colorado)
Interline Brands (Northern Colorado Paper)
OfficeMax Workplace Interiors
Source Office Products
VWR International

Punch-out Catalogs

Apple Computer
Agilent
Bio-Rad Laboratories
B&H Photo
CDWG
Gov Connection
CCi
CSU Bookstore
Dell Marketing
Fisher Scientific
Fort Collins Winlectric
Grainger, Inc.
Hughes Supply
Life Technologies
MWI Veterinary Supply
MSC Industrial
Office Max
OfficeScapes
Qiagen, Inc.
Sigma Aldrich
VWR International
Workplace Resources
Zunesis (HP Reseller)

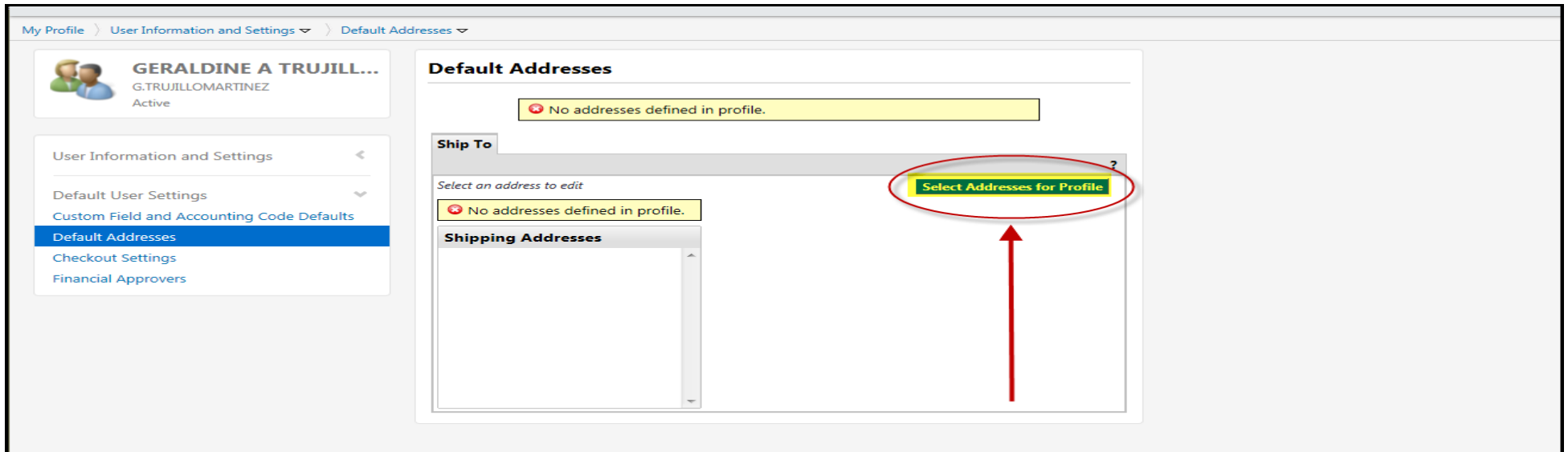
Profile Setup - Default Shipping Address

The screenshot shows the Quali Financial System interface. At the top, there is a navigation bar with "Kuali Financial System", "Menu", "Maintenance", and "Administration". The user's name "GERALDINE A TRUJILLO-MARTINEZ" is displayed in the top right, along with "Action Items", "Notifications", and "0.00 USD". A dropdown menu is open under the user's name, showing "View My Profile" and "My Recently Completed Carts". A red arrow points from the user's name to the dropdown menu, and another red arrow points from the "View My Profile" option to the "Shop" dropdown menu below.

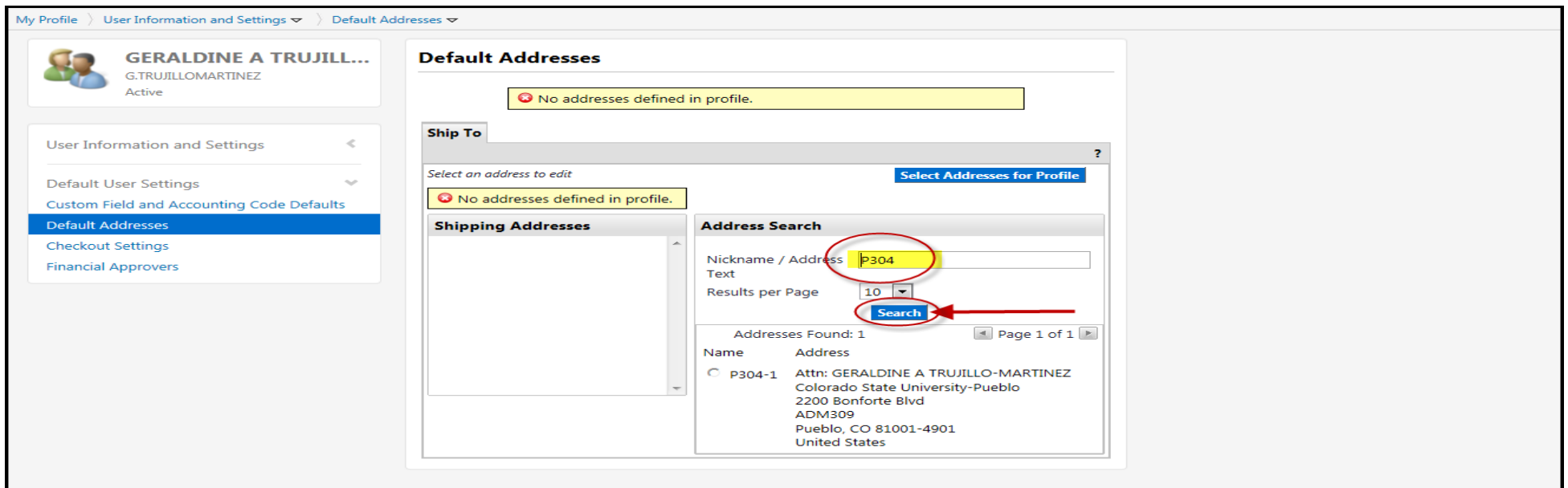
Click on user name and click on “View my Profile” to set up default shipping address.

The screenshot shows the "My Profile" page. On the left, there is a user profile card for "GERALDINE A TRUJILLO-MARTINEZ" with the email "G.TRUJILLOMARTINEZ" and status "Active". The main content area is titled "My Profile" and contains several sections: "User Information and Settings" (with "Default Addresses" circled in red), "User Access and Security", "Permission Settings", and "User Administration and History". A red arrow points from the "Default Addresses" link to the "View My Profile" option in the previous screenshot.

Click on “Default Addresses”.



Click on “Select Addresses for Profile”.



Enter your campus delivery code in the “Nickname/Address Text” box and then click “Search”.

No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address

Text

Results per Page

Addresses Found: 1 Page 1 of 1

Name	Address
<input checked="" type="radio"/> P304-1	Attn: GERALDINE A TRUJILLO-MARTINEZ Colorado State University-Pueblo 2200 Bonforte Blvd ADM309 Pueblo, CO 81001-4901 United States

Click the radio button next to the address on the search result.

Active

No addresses defined in profile.

Ship To

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Edit Selected Address

Nickname

Default

Current Default ---

Address

ADDRESS

Attn:

Address Line 1

Address Line 2

Address Line 3

City

State

Zip Code

Country

Click in the box next to Default and then click Save.

GERALDINE A TRUJILL...
G.TRUJILLOMARTINEZ
Active

User Information and Settings
Default User Settings
Custom Field and Accounting Code Defaults
Default Addresses
Checkout Settings
Financial Approvers

Default Addresses
Changes Saved

Ship To

Select an address to edit [Select Addresses for Profile](#) [Delete Address](#)

Shipping Addresses

P304-1

Edit Selected Address

Nickname
Default
Current Default P304-1
Address

A D D R E S S

Attn:
Address Line 1
Address Line 2
Address Line 3
City
State
Zip Code
Country

[Save](#)

The shipping code is now saved as a default in your KFS Shop Catalogs profile.

Profile Setup - Email Preferences (Optional)

Colorado State University [ation and Settings](#) > [Default Addresses](#)

GERALDINE A TRUJILL...
G.TRUJILLOMARTINEZ
Active

User Information and Settings
Default User Settings
Custom Field and Accounting Code Defaults
Default Addresses
Checkout Settings
Financial Approvers

Default Addresses

Ship To

Select an address to edit [Select Addresses for Profile](#)

Shipping Addresses

P304-1

Optional setting available to users. To setup email preferences, click on “User Information and Settings”.

The screenshot shows the 'User Information and Settings' page for user GERALDINE A TRUJILL... (G.TRUJILLOMARTINEZ, Active). The left sidebar contains a navigation menu with 'User Information and Settings' selected. The main content area is titled 'User Information and Settings' and lists several categories: 'User Profile and Preferences' (User's Name, Phone Number, Email, etc.; Language, Time Zone and Display Settings; Email Preferences), 'Default User Settings' (Custom Field and Accounting Code Defaults; Default Addresses; Checkout Settings; Financial Approvers), and 'User Profile and Preferences' (User's Name, Phone Number, Email, etc.; Language, Time Zone and Display Settings; Email Preferences). The 'Email Preferences' link is highlighted in yellow, and a red arrow points to it.


Click “Email Preferences”.

The screenshot shows the 'Email Preferences' page for user GERALDINE A TRUJILL... (G.TRUJILLOMARTINEZ, Active). The left sidebar contains a navigation menu with 'Email Preferences' selected. The main content area is titled 'Email Preferences' and contains a message: 'The in-application notifications are not yet available for all Email Preferences.' Below this, there are two sections: 'Purchase Orders' and 'Contract Manager'. The 'Purchase Orders' section has a table with the following rows: 'PO submitted into Workflow' (None (Default)), 'PO pending Workflow approval' (None (Default)), 'PO Workflow Notification available' (None (Default)), 'PO Workflow complete' (None (Default)), 'PO sent to supplier' (None (Default)), 'PO line item Backorder notice' (None), and 'PO line item Cancellation notice' (Notification). The 'PO sent to supplier' row is highlighted in yellow, and the 'Email' option is selected in the dropdown menu. A red arrow points to the 'Save' button at the bottom of the page.

Click from the drop down menu under “PO sent to supplier”. Click “Save”. When purchase orders are faxed, emailed, or sent electronically to a supplier, user will receive a KFS Shop Catalog email.



My Profile > User Information and Settings > Default Addresses

 **GERALDINE A TRUJILL...**
G.TRUJILLOMARTINEZ
Active

- User Information and Settings
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses**
- Checkout Settings
- Financial Approvers

Default Addresses

Changes Saved

Ship To

Select an address to edit

Select Addresses for Profile

Delete Address

Shipping Addresses

P304-1

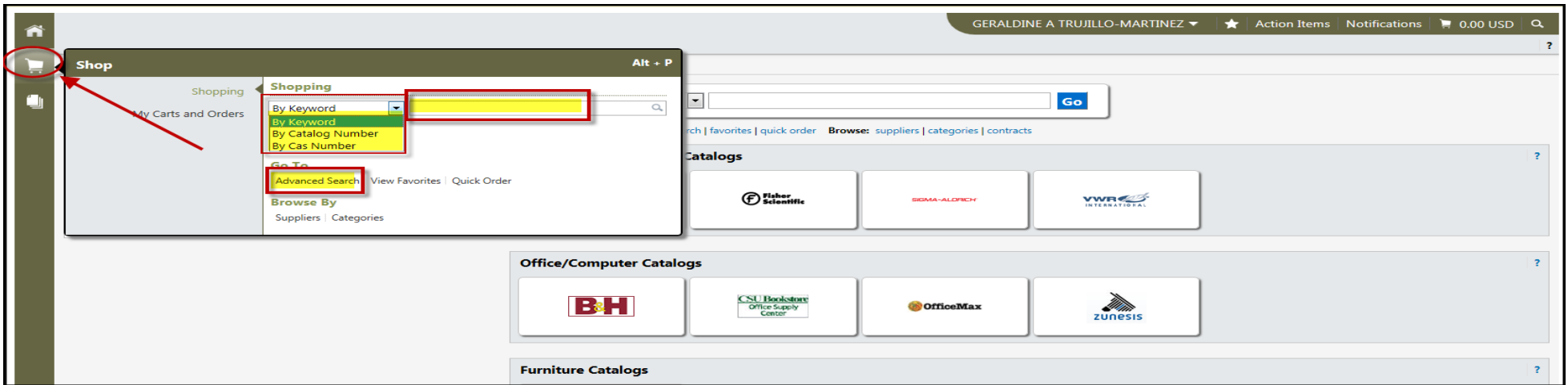
Edit Selected Address

Nickname	P304-1
Default	<input checked="" type="checkbox"/>
Current Default Address	P304-1
ADDRESS	
Attn:	GERALDINE A TRUJILLO-MARTINEZ
Address Line 1	Colorado State University-Pueblo
Address Line 2	2200 Bonforte Blvd
Address Line 3	ADM309
City	Pueblo
State	CO
Zip Code	81001-4901
Country	United States

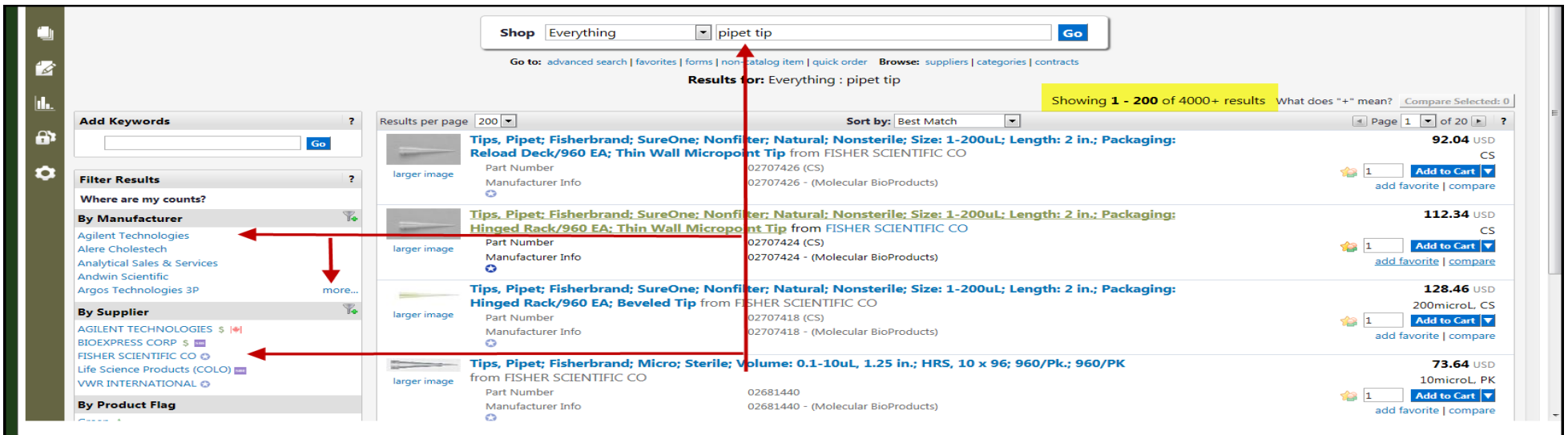
Save

Click the  button to return to the main page for KFS Shop Catalogs.

Hosted Catalog Searching



Clicking on the shopping cart from menu on left, the shop tab will “slide-out” and allow user to search for items **By Keyword**, **By Catalog Number**, or **By CAS Number**. Additionally users click on **Advanced Search** to allow more search filters.



A general search for “pipet tip” shows over 4000+ results. On the left side, the user can refine the search by selecting “By Manufacturer” line of pipet tips or selecting “By Supplier” for suppliers in KFS Shop Catalogs that carries pipet tips.

Shop Everything 02681440 Go

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts

Results for: Everything : 02681440

Showing 1 - 2 of 2 results Compare Selected: 0

Results per page 200 Sort by: Best Match Page 1 of 1

Add Keywords ?

Filter Results ?

By Manufacturer
Molecular BioProducts (2)

By Supplier
FISHER SCIENTIFIC CO (2)

By Supplier Class
STATE PRICE AGREEMENT/UNIVERSITY PRICE AGREEMENT (2)

By Category
Pipet Tips (2)

By Packaging UOM
CS (1)
PK (1)

By Result Type

larger image **Tips, Pipet; Fisherbrand; Micro; Sterile; Volume: 0.1-10uL, 1.25 in.; HRS, 10 x 96; 960/Pk.; 960/PK** 73.64 USD
from FISHER SCIENTIFIC CO
Part Number 02681440
Manufacturer Info 02681440 - (Molecular BioProducts)
1 Add to Cart
add favorite | compare

larger image **Fisherbrand SureOne Ultra Micropoint Pipet Tip, Universal Fit; Hinged rack, 10 x 96, sterile; 1.25 in. (31.8mm); 4800/CS** 330.51 USD
from FISHER SCIENTIFIC CO
Part Number 02681440 (CS)
Manufacturer Info 02681440 - (Molecular BioProducts)
1 Add to Cart
add favorite | compare

Searching by part number refines the search and provides results related to the catalog or part number. Once the item is found, update the quantity needed and click “Add to Cart”. The item will be added to the shopping cart.

Kuali Financial System
financial systems

Maintenance Administration

Colorado State University
KFS 5.0.3 (20140512-Prod) (Oracle9i)

action list doc search

Logged in User: swaroj Logout

73.64 USD

Shop Shopping Dashboard Shopping Home Product Search - All

Shop Everything 02681440 Go

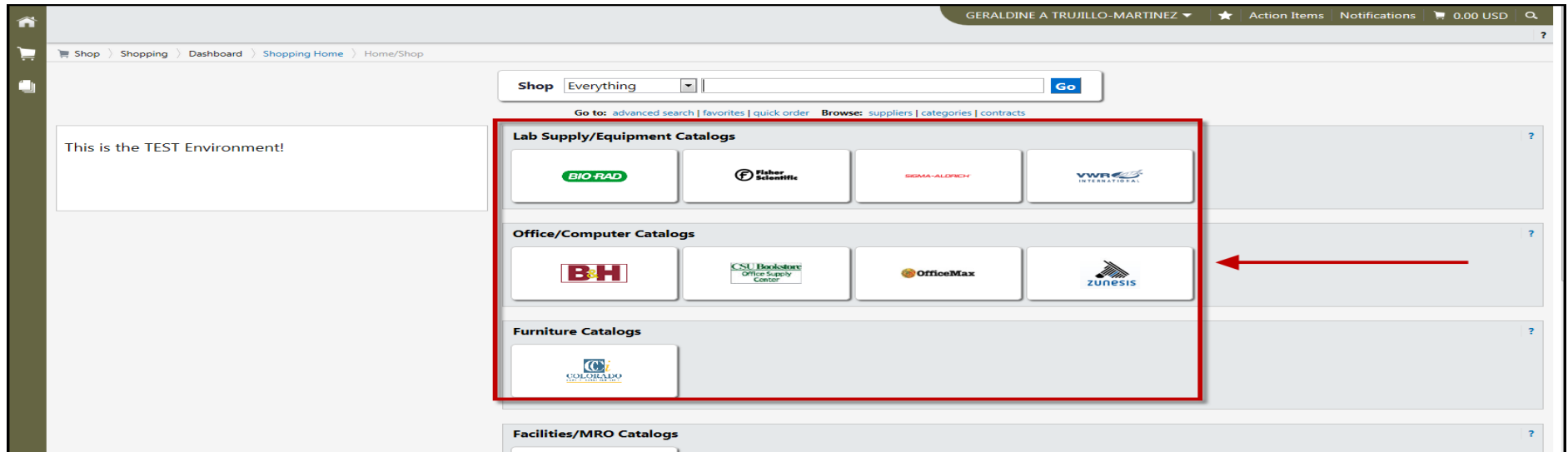
Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts

Results for: Everything : 02681440

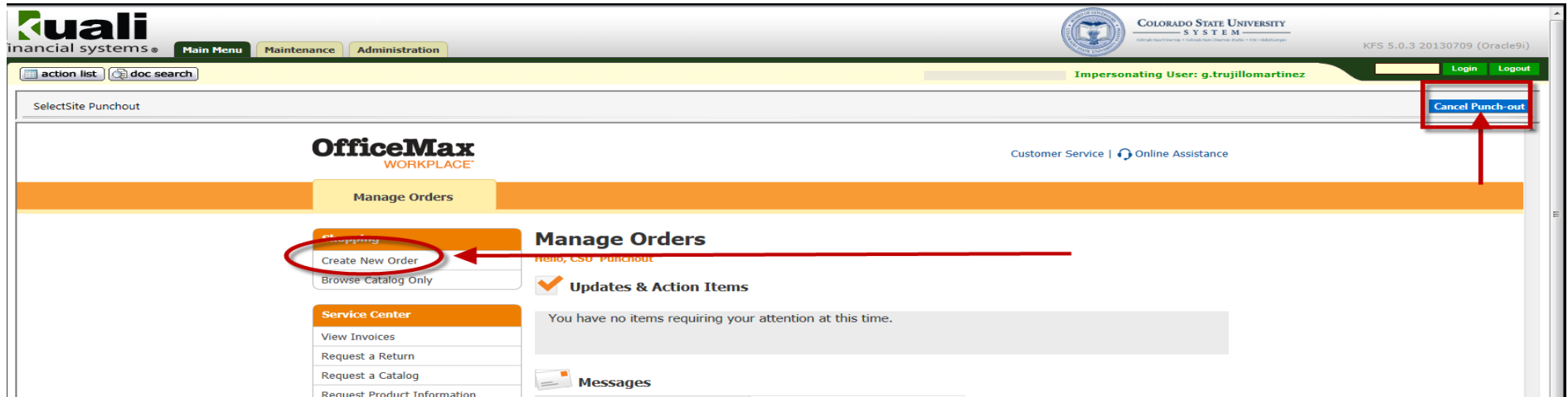
Showing 1 - 2 of 2 results Compare Selected: 0

The shopping cart is located in the upper right of the KFS Shop Catalogs screen.

Punchout Catalog Searching



Punchout catalogs are located in the middle of the KFS shop catalogs main page. Punchout catalogs are unique by allowing shopping by clicking on the supplier's logo and being redirected into the supplier's website to shop and add items to a cart.



When clicking on a supplier logo, a session is open to the supplier's website. These sites are the same shopping websites used on the web and where shopping for items occur. Select "Cancel Punch-out" if connected to a site in error. While in a suppliers shopping site user will remain within the Kuali Financial System.

SelectSite Punchout

OfficeMax
WORKPLACE

Customer Service | Online Assistance

View Cart 0 Subtotal: \$0.00 **Checkout**

post it notes **Search**

Messages Order By Item # Shopping Lists Ink & Toner Finder

Shop By Category

- Basic Office Supplies
- Binders & Filing
- Breakroom Supplies
- Calendars & Organizers
- Cleaning Chemicals
- Cleaning Supplies & Equipment
- Computer Accessories & Supplies
- Computer Hardware & Peripherals
- Computer Software
- Custom Printing
- Documents & Forms

Order by Item #

Add to Cart

* Required for each item added to cart.

Item #*	Qty*

Supplier websites may be different in terms of searching for products. Most sites will have a general “Search” field and “Shop By Category”.

view all

Narrow By

- Badges (2)
- Binders and Accessories (1)
- Boards (9)
- Correction Supplies (3)
- Desk Accessories (2)
- Easels (1)
- File Folders and Supplies (7)
- Highlighters (3)
- Index Dividers (20)
- Labelmakers and Tapes (4)
- Labels (14)
- Pads and Rolls (14)
- Pens (2)
- Self-Stick Flags (70)
- Self-Stick Notes (172)
- Tape (1)

Product Type

- Recycled Goods (27)

Brand

- 3M (15)
- Avery (4)
- Post-It (304)
- Redi-Tag Corporation (1)
- Sparco (1)

People Who Searched post it notes Also Viewed

Post-It - Notes Cabinet Pack - Yellow, 24/Pack, 3" x 5"

Price: \$23.88 **C**

Post-It - Note Pads in Pastel Color Value Pack - Assorted, 24/Pack, 4" x 6"

Price: \$5.66 **C**

Post-It - Super Sticky Notes - Canary Yellow - Yellow, 5/Pack, 4" x 6", Ruled

Price: \$6.54 **C**

Post-It - Note Pads in Pastel Colors - Assorted, 5/Pack, 4" x 6", Ruled

Price: \$6.43 **C**

Compare Sort By: Featured Items

Items 1 - 25 of 325 | 1 | 2 | 3 | 4 | 5 | ... | 13 | Next >

Post-It - Super Sticky Pop-Up Note Dispenser Bonus Pack - Black, 12/Pack, 3" x 3"

Item#: A2DS330SSVA
Unit: PK

Your Price: **\$17.57**

Delivery: Next Day

Qty: **Add to Cart**

Post-It - Note Pop-Up Refills Bonus Pack - Yellow, 18/Pack, 3" x 3", Pop-Up

Item#: A2R330-14-4B
Unit: PK

Your Price: **\$21.91**

Delivery: Next Day

Qty: **Add to Cart**


A search for post it notes resulted in 325 matches. Refine the search by using “Narrow By” or “Brand” on the left side of the page. Quantity can be updated and then clicking “Add to Cart” adds item to the shopping cart.

Shop By Category View All

Shopping Cart
 Account: 0224814 - CSU
 Ship To Code: PUNCH - Punchout Only

Your order is under \$50.
 Please consider adding to or consolidating your order.

Add to Shopping List

 Post-It - Super Sticky Pop-Up Note Dispenser Bonus Pack - Black, 12/Pack, 3" x 3"
 Item #: A2DS330SSVA
 UOM: PK

Your Price: \$17.57
 Item Total: \$17.57
 Delivery: 1 Next Day


Qty. **Update**

Your order is under \$50.
 Please consider adding to or consolidating your order.


Cart Subtotal: \$17.57

Continue Shopping **Checkout**

Also Consider

 Boise - X-9™ Multi-Use Copy Paper - 8-1/2" x 11", White, 92, 20 lb
 ★★★★★ 3.4 out of 5
Your Price: \$32.78
 UOM: CT

Qty. **Add to Cart**



Items are added to shopping cart. Click "Continue Shopping" to search and add more items to the cart or click "Checkout" to checkout and submit cart to the KFS Shop Catalogs checkout process.

ual
 ial systems

Main Menu Maintenance Administration

Colorado State University SYSTEM
 KFS 5.0.3 20130709 (Oracle9i)

Impersonating User: g.trujillomartinez Login Logout

GERALDINE A TRUJILLO-MARTINEZ Action Items Notifications 17.57 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition

Shopping Cart for GERALDINE A TRUJILLO-MARTINEZ

Continue Shopping
 1 item(s) for a total of 17.57 USD

Proceed to Checkout

Cart Name: 2014-05-19 G.TRUJILLOMARTINEZ
 Description:

Supplier / Line Item Details
 Show line details

OFFICE MAX more info...
 The item(s) in this group was retrieved from the supplier's website. What does this mean?
 You can no longer access this item(s) on the supplier's website. What does this mean?
 Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
POP-UP NOTE DISPENSER	A2DS330SSVA	PK	17.57	1 PK	17.57 USD
Supplier subtotal					17.57USD
Subtotal					17.57
Total					17.57 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Proceed to Checkout

Description, Catalog Number, Unit Price, Quantity, and Extended Price Items from the supplier site are transferred to the KFS Shop Catalogs cart. Click "Proceed to Checkout" from the KFS Shop Catalogs site.

Checkout Process/KFS Requisition

Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - Draft Requisition

General Shipping Final Review

Submit Cart to Kual

Go to Express Checkout Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Comments Attachments History

Summary Taxes/S&H

Hide header Hide value descriptions

General	Shipping
Cart Name Description 2014-05-19 G.TRUJILLOMARTINEZ 01	Shipping address Attn: GERALDINE A TRUJILLO-MARTINEZ Colorado State University-Pueblo 2200 Bonforte Blvd ADM309 Pueblo, CO 81001-4901 United States

Supplier / Line Item Details

Hide line details For selected line items Add To Favorites Go

OFFICE MAX \$ more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s) 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
POP-UP NOTE DISPENSER more info... Manufacturer Name 3M OFFICE SUPPLY DIVISIO Manufacturer Part Number DS330-SSVA Supplier Part Auxiliary ID more info...	A2DS330SSVA	PK	17.57	1 PK	17.57 USD

Review Cart Name, Shipping Profile, and Line Item Details. Click "Submit Cart to Kual" to transfer the KFS Shop Catalogs cart to Kual to build the requisition.

Document Overview									
* Description: 2014-05-19 G.TRUJILLOMARTINEZ 01					Explanation:				
Organization Document Number:									
Financial Document Detail									
* Year: 2014					Total Amount: 17.57				
Requisition Detail									
* Chart/Org: PB / P304					* Funding Source: INSTITUTION ACCOUNT				
Receiving Required: <input type="checkbox"/>					Payment Request Positive Approval Required: <input type="checkbox"/>				
Account Distribution Method: Proportional									
Delivery hide									
Final Delivery									
* Delivery Campus: PC - CSU Pueblo Campus					* Delivery To: TRUJILLO-MARTINEZ, GERALDINE A				
Building: ADMINISTRATION building not found set as default building					Phone Number: 719-549-2054				
* Address 1: 2200 Bonforte Blvd					Email: g.trujillomartinez@colostate-pueblo.edu				
Address 2:									
* Room: 309									
* City: Pueblo									
State: CO									
Postal Code: 81001									
* Country: United States									
Receiving Address									
Receiving Address:					P304-1 2200 Bonforte Blvd ADM309 Pueblo, CO 81001-4901 United States				
Address To Vendor									
					Use Receiving Address as Shipping Address Presented to Vendor? Yes				
Vendor hide									
Vendor Address									
Suggested Vendor: OFFICEMAX INC Shop Catalogs					City: ATLANTA				
Vendor #: 25003-0					State: GA				
Address 1: PO BOX 101705					Province:				
Address 2:					Postal Code: 30392-1705				
Attention:					Country: United States				
Vendor Info									
Customer #:					Payment Terms: Net 0 Days				
Notes To Vendor:					Shipping Title: DESTINATION				
Contract Name: Office Max contract					Shipping Payment Terms: VENDOR PAYS ("ALLOWED")				
Phone Number:					Contacts:				
Fax Number:					Supplier Diversity:				
Items hide									
setup distribution remove accounts from all items remove commodity codes from all items expand all accounts collapse all accounts									
Current Items									
Item Line #	Item Type	Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost	Extended Cost	Actions
Item 1									
1	QUANTITY	1.00	PK PACK	A2DS330SSVA		POP-UP NOTE DISPENSER	17.57	17.57	delete
	show Accounting Lines								
Totals									
Grand Total:								17.57	
APO Limit:								10,000.00	

The requisition is populated with contents from the KFS Shop Catalogs cart. Account information must be entered in order to submit the requisition for workflow approval.

Item Line #	Item Type	Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost	Extended Cost	Actions
1	QUANTITY	1.00	PK PACK	A2DS330SSVA		POP-UP NOTE DISPENSER	17.57	17.57	delete
								Grand Total:	17.57
								APO Limit:	10,000.00

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.

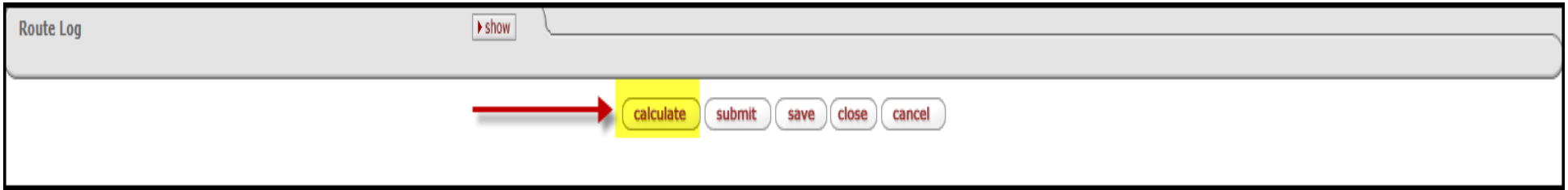
Header Level Funding

* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	Percent	Amount	Actions
CO State University							100.00		add

Item Line #	Item Type	Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost	Extended Cost	Actions
1	QUANTITY	1.00	PK PACK	A2DS330SSVA		POP-UP NOTE DISPENSER	17.57	17.57	delete

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.

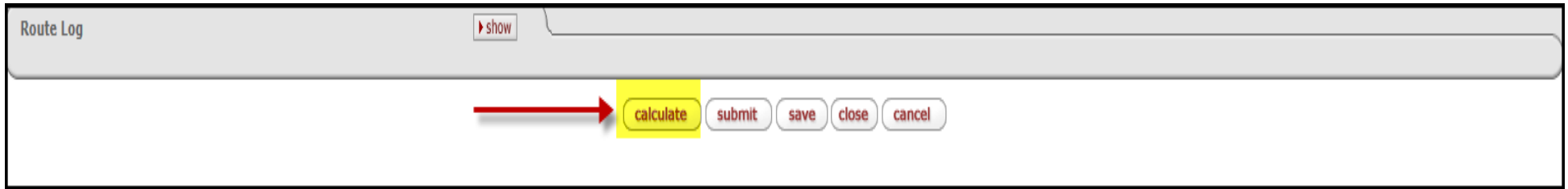


Remember to click “calculate” at the bottom of requisition before clicking “save” or submit”.

Line Level Funding

Current Items										
Item Line #	Item Type	Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost	Extended Cost	Actions	
Item 1										
	QUANTITY	1.00	PK PACK	A2DS330SSVA		POP-UP NOTE DISPENSER	17.57	17.57		
	▼ hide Accounting Lines									
	Accounting Lines ? hide detail									
	Source									
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	Percent	Amount	
	PB CO CR BG GC PB							0.00		
									Actions	
									add	
Totals								Grand Total:	17.57	
								APO Limit:	10,000.00	

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”.



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

kuali financial systems
Kuali Financial System

Main Menu Maintenance Administration

action list doc search

Colorado State University SYSTEM
KFS 5.0.3 20130709 (Orade91)

Login Logout

Requisition ?

Document was successfully submitted.

Doc Nbr:	3103000	Status:	ENROUTE
Initiator:	g.trujillomartinez	Created:	12:54 PM 05/15/2014
Requisition #:	311943	Requisition Doc Status:	In Process

expand all collapse all
* required field

Document Overview hide

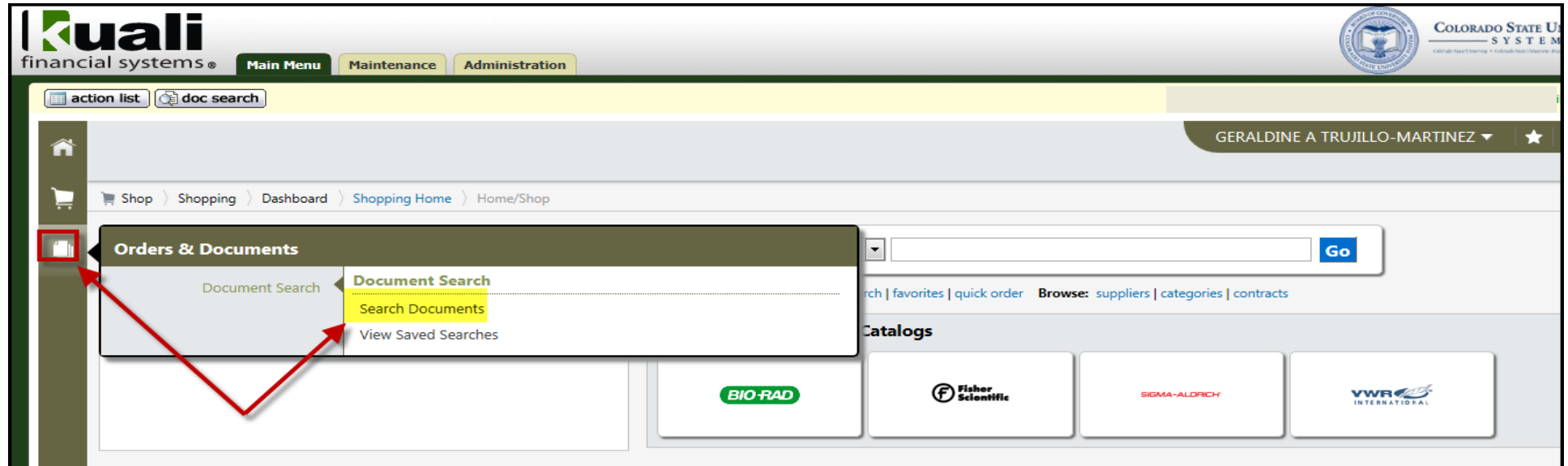
* Description: test		Explanation:
Organization Document Number:		

Financial Document Detail

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

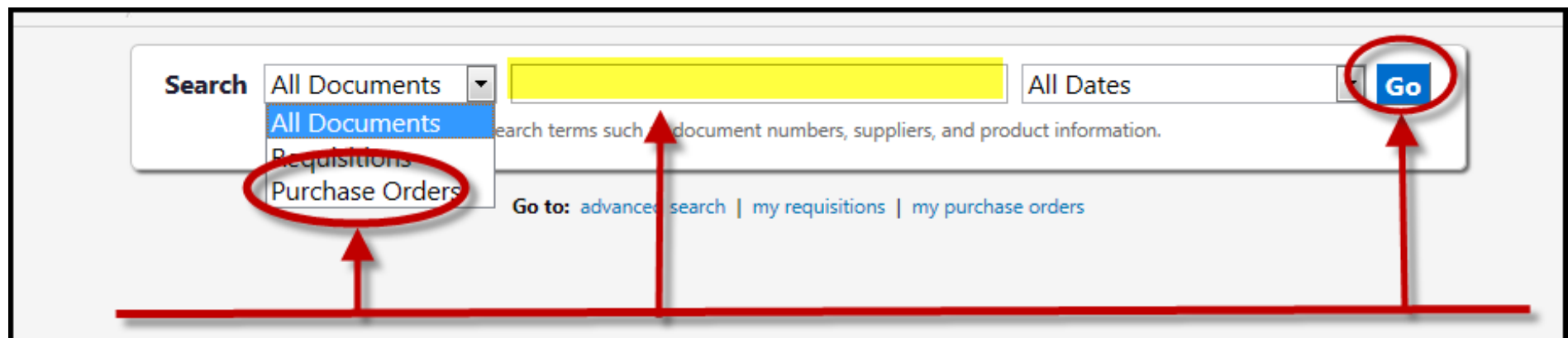
PO History Lookup

To look up a purchase order in KFS, go to Shop Catalogs under Purchasing/Accounts Payable under the Transactions tab on the left hand side of the Main Menu.



The screenshot shows the Kuali financial systems interface. At the top left, the Kuali logo and 'financial systems' are displayed. Navigation tabs include 'Main Menu', 'Maintenance', and 'Administration'. A user profile for 'GERALDINE A TRUJILLO-MARTINEZ' is visible in the top right. The main navigation area shows a breadcrumb trail: 'Shop > Shopping > Dashboard > Shopping Home > Home/Shop'. A sidebar menu is expanded to show 'Orders & Documents', which includes 'Document Search', 'Search Documents', and 'View Saved Searches'. A red box highlights the 'Orders & Documents' icon in the sidebar, and a red arrow points from it to the 'Search Documents' option. Below the menu, there are logos for 'BIO-RAD', 'Fisher Scientific', 'SIGMA-ALDRICH', and 'VWR INTERNATIONAL'.

Click on the  button to expand the slide out. Click on "Search Documents".



This close-up screenshot shows the search interface. A dropdown menu is open, showing options: 'All Documents', 'All Documents', 'Requisitions', and 'Purchase Orders'. The 'Purchase Orders' option is circled in red. A red arrow points from this option to a search input field, which is highlighted in yellow. Another red arrow points from the search input field to a 'Go' button, which is also circled in red. Below the search area, there are links for 'Go to: advanced search | my requisitions | my purchase orders'.

Select "Purchase Orders" from the drop down menu, input the KFS PO number in the field and click "GO" to search for the PO Number.

The screenshot shows a web application interface for searching purchase orders. At the top right, the user is identified as GERALDINE A TRUJILLO-MARTINEZ. The breadcrumb trail indicates the current location is 'Orders & Documents > Document Search > Search Documents > Document Search'. The search results show 'Showing 1 - 1 of 1 results' for the keyword '416416'. The search criteria are: Type: Purchase Orders, Date Range: All Dates. The search results table has the following data:

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	PO Total
416416	Fionas	5/20/2014 11:43 AM		GERALDINE A TRUJILLO-MARTINEZ	Sent	600.00 USD

The PO number '416416' in the first row is highlighted with a red circle and a red arrow pointing to it. The interface also includes a 'Save Search' button and a 'Refine Search Results' section with a dropdown menu set to 'Purchase Orders'.

Click on the PO number to open the PO.

Return to Search Results 1 of 1 results Purchase Order Number(s) 416416

PO/Reference No. 416416 Revision 0 Supplier Fionas Available Actions Add Comment Add Comment Add Notes to History Print Fax Version Go

Status Purchase Order Revisions PO Approvals Shipments Comments Attachments **History**

General Information

PO/Reference No.	416416
Revision No.	0
Supplier Name	Fionas
Purchase Order Date	5/20/2014
Total	600.00
Owner Name	GERALDINE A TRUJILLO-MARTINEZ

Document Status

A/P status	Open
Workflow	✓ Completed (5/20/2014 11:44 AM)
Distribution	The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view
Fax: +1 (970) 530-2125	
Distribution Date/Time	5/20/2014 11:44 AM
Supplier	Sent To Supplier view

Line Item Status

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Matching
1 ✓ setup more info...		LOT	600.00	1 LOT	600.00 USD	Sent To Supplier	No Matches
Total					600.00 USD		

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Click on "History" to view the PO distribution method and time the PO was delivered to the vendor.

Print Fax Version of PO

Return to Search Results 1 of 1 results Purchase Order Number(s) 416416

PO/Reference No. 416416 Revision 0 Supplier Fionas Available Actions Add Comment Add Comment Add Notes to History **Print Fax Version** Go

Status Purchase Order Revisions PO Approvals Shipments Comments Attachments History

General Information

PO/Reference No.	416416
Revision No.	0
Supplier Name	Fionas
Purchase Order Date	5/20/2014
Total	600.00
Owner Name	GERALDINE A TRUJILLO-MARTINEZ

Document Status

A/P status	Open
Workflow	✓ Completed (5/20/2014 11:44 AM)
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Fax: +1 (970) 530-2125	
Distribution Date/Time	5/20/2014 11:44 AM
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Line Item Status

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Total					600.00 USD		

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

To print a Fax version of the PO, select from the drop down menu the "Print Fax Version" and click "Go".

File Edit View Favorites Tools Help

CSU Secure Access SSL VPN https--ieonline.microsoft... https--ieonline.microsoft... KFS Procurement Card OWA PCARD RS Procurement Services - C... Procurement Services - C...

TEST PO-PLEASE DO NOT FULFILL **Purchase Order**

Purchase Order Date	PO/Reference No.	Revision No.
May 20, 2014	416416	0
Purchaser Information		
Requestor Name		GERALDINE A TRUJILLO-MARTINEZ

010 Campus Delivery
Purchasing Department
55 S. Howes Street
Fort Collins, CO 80523
70-491-5105

Order acceptance instructions:
Purchase Order Terms and Conditions <http://www.purchasing.colostate.edu/pages/pdf/potermconditions.pdf>

Supplier Information		Delivery Information	
Supplier Name	Delicatessen And Catering	Delivery Address	Colorado State University
Address	Fort Collins, CO 80525	Name	TRUJILLO-MARTINEZ, GERALDINE A
City/State/Zip		ContactEmail	g.trujillomartinez@colostate-pueblo.edu
Fax	+1 (970) 530-2125	Phone	719-549-2054
E.O.B.		Building	ADMINISTRATION - Rm 309
Payment Terms		P304-1	
		2200 Bonforte Blvd	
		ADM309	
		Pueblo, CO 81001-4901	
		United States	
		ShipTo Address Code	P304-1
		Delivery Information	
		Requested Delivery Date	
		Expedite	No
		Ship Via	Best Carrier-Best Way

Shipping Instructions
APPENDIX 2 PO terms conditions.tif (132k)

Supplier Terms and Conditions

Line No.	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
1 of 1	setup		LOT	600.00 USD	1 LOT	600.00 USD
	Taxable	No				
	Capital Expense	No				
	PO Clauses	Refer below				
Shipping, Handling and Tax charges are calculated and charged by each supplier.						600.00 USD

Click on the printer to print a copy of the PO from their browser or go to File and scroll down to Print.