Step 1: Access the Portal

A. Go to https://portal.uci.edu, log on and select Finances/KFS.
B. In the Purchasing portlet, navigate to KFS Purchasing and select Requisition.

Step 2: Document Header
Displays information to assist in retrieving or tracking a Requisition.

A. Write down the document number (Doc Nbr) for future reference.
   - Used to look up the document and appears on the General Ledger.
B. Requisition # populates upon the first save of the document (this is not the same number as a PO#).
C. Users can toggle between expand all and collapse all to manage viewing of information on their screen.
D. Select show to view/edit the content within each tab if collapse all is selected.
Step 3: Document Overview Tab

A. Enter information in the Description field (40 characters maximum).
   - Write a description that makes sense to others who will view the document.
   - Information in the description field populates in the Action List under the Title column.
B. Use the Explanation field to notate attachments that are included in the Requisition so that the buyer will be made aware when viewing the unapproved Purchase Order. See note information to the right.
C. The Organization Document Number is an optional 10 character field which appears in the General Ledger.
D. Year defaults to the current fiscal year.
E. Chart/Org defaults to the initiator’s home Organization (department) code.
   - Use within the Chart/Org field to change the code. For example, user is purchasing for a different Organization. This ensures that the Requisition routes to the correct Contract Manager.
F. Funding Source defaults to Institution Account (only option).

Equipment for Research and Development: Enter information in the Explanation field to detail the specific equipment that qualifies for Reduced Sales/Use Tax. For example: Per PI, equipment items in line 1, 2, & 4 are for research and development; apply CA Partial Reduced Tax.

Trade-in: Note trade-in information in this field. Provide trade-in property ID tag numbers and the amount. Also note this in the Description field of the line item that the trade-in applies to.

Remember to save!
Step 4: Delivery Tab
A. **Delivery Campus** defaults to the initiator’s home campus.
   - Use the button to change the campus delivery location.
   - IR (UC Irvine), MC (Medical Center) or SW (Systemwide)
B. Use the button in the **Building** field to search for the desired building or off-campus address.
   - Refer to Using the Lookup Feature Within a Requisition, Building Lookup for assistance.
   - If the building location is used frequently, select the button for future Requisitions.
C. In the **Address 2** field, enter Organization (department) name.
D. In the **Room** field, enter the room number or “NOROOM.”
   - If the selected building contains room numbers, the button appears to assist in locating a room number.
E. The **Delivery To** field auto-populates with the initiator’s information, but can be changed using the steps below:
   - Use the button to search for an employee.
   - **Phone Number** and **Email** fields auto-populate with the employee’s information.
   - **Date Required** and **Date Required Reason** are used for internal reference for Contract Managers only. Expedited shipping/delivery charges may apply depending on when the order is processed.
F. The **Delivery Instructions** field is transferred to the purchase order and will be visible to the vendor. If necessary, enter delivery instructions that are helpful to the vendor, for example: *Contact Susan Smith at (949) 824-0000 for delivery questions.*
Step 5: Vendor Tab

A. The **Suggested Vendor** field communicates vendor preference to the Contract Manager. Refer to Using the Lookup Feature Within a Requisition, Vendor Lookup for assistance.

- The Requisition auto-populates a majority of the vendor fields based on the vendor’s profile in KFS.
- The address field is editable.
- **PO Transmission, Fax Number** and **Email** populate based on vendor profile; however, the final method is chosen by the Contract Manager.

B. Under the **Vendor Info** section, users can enter a **Customer #** (if available). **Notes to the Vendor** field does not transmit to the vendor; do not use this field.

C. Complete the **Additional Suggested Vendor Names** field to provide additional choices to the Contract Manager.

Remember to save!

**Note:** The name of the vendor appears on the General Ledger under the Transaction Ledger Entry Description column.

New vendors can be requested using the link from the portal. See image below.
Step 6: Items Tab

**Policy Reminder:** Goods or services that can only be authorized and purchased by a Central Purchasing buyer cannot be combined with goods or services that are purchased by a Departmental Buyer. Do not combine items from different vendors on one Requisition. For example, a desk cannot be on the same Requisition as a file folder. Review the Purchasing Methods Guide (By Commodity) for more information: Portal > Finances/KFS > Purchasing > Training and Resources > Buyer and Commodities Lists.

**Adding Item(s)**

A. **Item Type** defaults to Qty, taxable. Other options include:
   - Qty, nontaxable—ex. downloaded software, advertisements, memberships, postage, etc.
   - No Qty, taxable—ex. services or goods when there is an undetermined quantity
   - No Qty, nontaxable—ex. services

B. For **Qty** selections under **Item Type**, complete both the **Quantity** and **UOM** fields. Use the button under **UOM** to find the correct UOM—conduct a blank search to bring up a list of all UOM values.
   - No Qty selections do not require a quantity or UOM.

C. In the **Catalog #** field, enter a catalog number if applicable.

D. In the **Commodity Code** field, use the button to find the appropriate code.

Refer to Using the Lookup Feature Within a Requisition, Commodity Code for assistance.

E. In the **Description** field, enter the item or service first, then descriptive features (noun first, verb/adjective: ex. Highlighters, Assorted Colors).
   - The first 254 characters transmit to the vendor on the Purchase Order. Make sure Trade-in info is noted here too.

F. In the **Unit Cost** field, enter the estimated cost and select the button under the **Action** column to calculate the **Extended Cost**.

G. After the item(s) is added, it moves to the **Current Items** section. A new line appears above for additional entries.
Adding Items Continued

H. Under the **Totals** section of the **Items** tab, the **Total Prior to Tax** is displayed. **Total Tax** is shown after the Requisition is calculated at a later step.

**Add Account Information**: There are two different methods to add account information.

- **Method 1**: Use **show** when there is only one line item with one or more account numbers.
- **Method 2**: Use **setup distribution** when there are two or more line items with the same account number.
  - This method can also be used if the majority of the items are distributed to one account number and only a few will have a different account number. For example, account number GF12745 applies to line items 1 – 8, and account number GF12741 applies to line items 9 – 10.

**Steps for Method 1: show**

A. Select the **show** button below the item.
B. The **Accounting Lines** fields are directly below the item.
C. **Chart** defaults to the initiator’s home campus (use the drop-down menu to change campus code).
D. In the **Account Number** field, use the ❌ button to find the appropriate account.
  - Refer to **Using the Lookup Feature Within a Requisition**, Account Lookup.
E. In the **Object** field, use the ❌ button to find the correct code.
  - Refer to **Using the Lookup Feature Within a Requisition**, Object Code Lookup.
F. The **Org Ref ID** is an optional 10 character field which appears on the General Ledger.
G. In the **Percent** field, enter a percentage to indicate the breakdown of funds.
  - If there are multiple account numbers, change the percent to the correct amount, ex. 50%.
H. Select the **add** button under the **Actions** column. This creates a new line above for additional entries.

**Note**: Shipping, special handling, or freight fees that apply, may be included as a separate line item (Qty, taxable or Qty, nontaxable). Do not enter this information in the Additional Charges section. Do not use the Trade-in line as it doesn’t transfer over to the PO. Instead, provide details in the **Explanation and Description** field.
Steps for Method 2: setup distribution

A. After the last item is added, select the setup distribution button above the first item.

B. A Commodity Code sub tab opens, which displays the fields for Accounting Lines directly above the Current Items sub tab.

C. Chart defaults to the initiator’s home campus (use the drop-down menu to change campus code).

D. In the Account Number field, use the button to find the appropriate account.

   Refer to Using the Lookup Feature Within a Requisition, Account Lookup.

E. In the Object field, use the button to find the correct code.

   If there are multiple items added to the Requisition and the items have different object codes, select the object code for the first line item (the rest of the line items need to be changed manually).

   Refer to Using the Lookup Feature Within a Requisition, Object Code Lookup.

F. The Org Ref ID is an optional 10 character field which appears on the General Ledger.

G. In the Percent field, enter a percentage to indicate the breakdown of funds.

   If there are multiple account numbers, change the percent to the correct amount, ex. 50%.

H. Select the button under the Actions column. This creates a new line above for additional entries.

I. After the account(s) are added, select distribute to items to disperse the account information to the items.

J. Select the show button to validate that the account was applied to the items.

   This is where the Account Number, Object, and Percent can be manually changed.

save  Remember to save!
Step 7: Additional Institutional Info Tab (optional)

- This tab is optional and can be used for department tracking and reporting only. It is not transmitted to the vendor.
- Required fields in this section auto-populate with the initiator’s default information; however, if the information was changed in the Delivery Tab (step 4) then users may need to change the fields within this tab.
- Use the button or manually type over the fields to populate the correct information.
- Save changes if applicable.

Step 8: Notes and Attachments Tab (if applicable)

A. In the Note Text field, type “upload” to indicate an attachment.
   - As a reminder, be sure to make note of an attachment in the Explanation field of the Document Overview tab.
B. In the Attached File field, select the button to upload an attachment (PDF / less than 5 MB).
   - Examples of attached files include quotes, sole source justifications, emails, etc.
   - Never attach documents that contain sensitive information, ex. social security numbers, home addresses, proprietary, copyrighted, health records (HIPAA), etc.
   - Attachments cannot be deleted from the system. If sensitive information was mistakenly attached, contact KFS@uci.edu for assistance.
   - If an attachment was mistakenly uploaded and did not contain confidential information, type “disregard attachment” in the Note Text field.
   - Do not upload any invoices to be paid. Send all invoices to accounts-payable@uci.edu.
C. Select the button to complete the file upload.

Remember to save!
Step 9: Calculate and Submit the Requisition
A. After all the information is entered, scroll to the end of the Requisition and select calculate. After calculate is selected, scroll back to the Items tab and check to make sure that tax calculated for the item.

Troubleshooting tips if tax doesn’t populate:
- Check to make sure the item was added correctly
- Check to make sure the Accounting Lines were inputted correctly
- Double check that all required fields are complete
B. Next, scroll down and select submit.
C. A confirmation message appears under the Requisition header and then routes to the next user in the Requisition workflow.
- If an error message appears, correct the indicated error(s) and select submit again.

Step 10: Reload
A. After the Requisition is submitted, scroll down and select the reload button.
B. On the document header, the current status of the Requisition is displayed.

Step 11: Route Log Tab Tutorial
A. The ID section displays information about the initiator and the number shown directly to the right of ID is the document number (Doc Nbr).
B. The Actions Taken section displays the time and date the document was last saved and completed.
C. The Pending Action Requests section displays the next required action.
D. The Future Action Requests section displays all future required actions.

Step 12: Exit the Requisition...the first part is done!
- Scroll down and select the close button to exit.
Helpful Features in KFS

Setting Up Default Account Numbers
Users can store multiple accounts to use when completing Requisitions.

A. The first time an account is added an option to save the account appears. Saving locks in the account as a default. Users can have one primary default and many secondary defaults.
   - After selecting save, a confirmation message appears by the Items tab.

B. When there is two or more default accounts, users can select the defaults button, and choose from a list of frequently used accounts.

C. The Primary Default column notates the primary default with a Yes. Secondary accounts are noted with a No.

D. Select return value on the appropriate account.

Complete the following steps to change a primary default or to delete an account.

E. Go back to the Finances/KFS tab, under the Purchasing portlet, select Edit Default Account for Requisitions.

F. Under the Actions column, users can choose to select Set As Primary or Delete the account.
   - A confirmation message appears after a selection is made; select the back button to return to User Default Account Lookup page.
   - Select the cancel button return to the KFS tab in the portal.
**Action List Helpful Features**

Users should familiarize themselves with these areas to help navigate KFS.

**Action List:** Requisitions that *require* action are listed here. For example, a Requisition that timed out, or was saved and still needs to be completed.

A. Go to [https://portal.uci.edu](https://portal.uci.edu), log on and select Finances/KFS.

B. In the **Tools & Support** portlet, select **KFS Action List**.

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**Action List Tutorial**

A. **ID**—Document Number: it is important to write the number down as this is the easiest way to find Requisition.

B. **Title**—Description of the Requisition.

C. **Route Status**—Options include:
   - **Saved**—Saved Requisition that needs to be completed.
   - **Enroute**—Requisition that is en route for approval.
   - **Disapproved**—Requisition was canceled and may need further action.

D. **Date Created**—Helpful to assist in locating a Requisition.

E. **Log**—Select the icon to view the Route Log to show where the Requisition resides in the workflow process.

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**Message appears when there are no items in Action List.**
Preferences: KFS allows users to customize settings to provide a personalized view of their Action List.

A. Select preferences.
B. The Action List Page Size field defaults to 10, which represents the maximum amount of documents that display on a page before a new page is added to the Action List.
   • We recommend increasing this number to avoid having to navigate through multiple pages. For example, 100, 300, etc.
C. Users can set preferences for Email Notification. Options include: Immediate Daily, Weekly, and None. It’s recommended to select None to avoid inundating each user’s email. Instead, it’s recommended for users to check their Action List as often as they check email.
D. Users can color-code the action list items in the Document Route Status Colors for Action List Entries section.
E. Save your preferences.
**Filter**: This feature allows users to filter their **Action List** to view specific documents. For example, entering **Requisition** in the **Document Title** field filters the **Action List** so that only **REQS** documents are displayed, and removes all other documents from view.

A. From the **Action List** page, select **filter** located in the upper right portion of your screen.

B. In the **Document Title** field, type in the name of the document (as it appears on the **Action List** page) you wish to view.
   - Or check the **Exclude?** box to eliminate a specific document from showing up on the **Action List**.

C. Use the **Document Route Status** and the **Action Requested** drop-down menus to filter further.

D. The **Document Type** field can also be used. Select 📄 to search for the document. Users can also check the **Exclude?** Box to eliminate a specific document from showing up on the **Action List**.

E. **Date Created** and **Date Last Assigned** are also helpful filters to use.

F. After the filter criteria are selected, select the **filter** button to view results.

G. Select **clear filter** to view all items in **Action List**.
Clearing FYIs From Action List

A. Documents that were sent to the user as an FYI are noted in the **Action Requested** column and stay in the **Action List** until cleared by the user.

B. To clear FYI documents individually, in the **Actions** column, use the drop-down arrow and change **NONE** to **FYI** (per document). Scroll to the end of the page and select **take actions**.

C. To clear FYIs on each page, go to the upper right corner, next to the **apply default** button, and select the drop-down arrow to change **NONE** to **FYI**. Scroll to the end of the page and select **take actions**.

- This only clears items listed on that page. If users have multiple pages, they will need to perform this action on each page, or they can change how many documents appear on each page from **preferences**.
Performing a Custom Document Search

Step 1: Access Portal
A. Log in and select the Finances/KFS tab.
B. In the Purchasing portlet, select the + button next to Custom Document Search and select Requisitions.

Step 2: Enter Search Criteria.
A. Type field defaults to REQS.
B. Enter the UCInetID of the initiator.
C. If the document number is known, type the number in the Document/Notification Id field.
D. The Date Created From and Date Created To fields are helpful to narrow the search.
E. The Account Number and Organization Code fields can also be used to assist in a search.
F. After all search criteria is entered in applicable fields, select search.
How to Lookup the PO After the Requisition is Final

After the Requisition is Final (document went through workflow) and is an unapproved Purchase Order, users can access the Purchase Order through the Requisition using the Custom Document Search instructions on page 15.

A. After search criteria is entered, the results display below. Select the Document/Notification ID link to view the Requisition.

B. Scroll to the View Related Documents tab and select show. The Purchase Order number is displayed, and users can select the link to view the actual Purchase Order document.

- UNAPPROVED displays for all Purchase Orders that aren’t final (haven’t been submitted to the vendor). Unapproved dissapears after the Purchase Order is submitted.