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. 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 below.
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).

![DOCUMENT OVERVIEW]

**Note:**

**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.

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**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 **Set as Default Building** 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.*

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**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, Building Lookup for assistance.

- If the building location is used frequently, select the button for future Requisitions.

B. Under the **Vendor Info** section, users can enter a **Customer #** (if available).

C. Complete the **Additional Suggested Vendor Names** field to provide additional choices to the Contract Manager (optional).
**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/adjecive: 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.
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.

**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.

**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%.

**OR**

H. In the **Amount** field, you can enter a dollar amount.
   - The amount entered, if split funded, will be calculated by the system into a percentage.

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

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**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%.
   OR
H. In the Amount field, you can enter a dollar amount.
   • The amount entered, if split funded, will be calculated by the system into a percentage.
I. After the account(s) are added, select distribute to items to disperse the account information to the items.
J. Select the button under the Actions column to validate that the account was applied.
   • This is where the Account Number, Object, and Percent or Amount can be manually changed.

Note: The Bal inquiry button appears once the Accounting Lines are added. The balance of the account can be viewed by clicking on the button after account information is added. This is mainly used by Fiscal Officers.
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.
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 is 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.