Step 1: Access the Portal

A. Go to https://portal.uci.edu, log on and navigate to Finances/KFS.
B. In the Tools & Support portlet, select KFS Action List.
C. Select the Purchase Order (PO) from the Action List under the ID column.

Step 2: The document header displays information to assist in retrieving or tracking a Purchase Order.

A. Write down the document number (Doc Nbr) for future reference (appears on the General Ledger).
B. Purchase Order #: The unapproved PO is the same as the approved/final PO and can be used to consult with vendors (also appears on the General Ledger).
   • Write down the PO# to print PO from UCIBuy.
   • Users can perform a document search to find their PO later, using multiple search criteria.

Step 3: Validate the Document Overview Tab
A. Information in the **Description** field is populated from the Requisition.

B. The **Explanation** field contains additional notes or explanations transferred from the Requisition.

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. Verify that the **Chart/Org** is correct.

F. Departmental buyers should only use **L – Low Val $0.01 - $5,000.00** in the **Purchase Order Type** field.
   - All other PO Type categories are used by Central Purchasing or other select units on campus.

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**Step 4: View Related Documents Tab**

A. Scroll to the **View Related Documents** tab and select the **Show** button next to the **Requisition** number.

B. Select the **Requisition** number link to open the Requisition.

C. Scroll down to the **Notes and Attachments** tab and select the icon in the **Attached File** column to open and view the uploaded attachment.
   - Save the attachment(s) to the desktop for future use (step 9).
Step 5: Validate Delivery Tab
A. Validate all required fields.
B. Validate that the correct Department/Organization name is in the Address 2 field.
C. Look for any information in the Date Required, Date Required Reason, or Delivery Instruction fields.
   - Expedited shipping charges must be noted in the Delivery Instructions field.
   - If the Date Required field is blank, type in a date.

Step 6: Vendor Tab
A. Complete, add information, and/or validate the vendor.
   - Contract Managers should change the vendor on a PO only if they know of a better source.
   - To change the Vendor, select a KFS onboarded vendor by using the lookup button.
B. The Customer # field is optional. Enter or verify customer account number if applicable.
C. Method of PO Transmission determines how the PO is communicated to the vendor. The field defaults to Auto Fax, therefore Contract Managers need to verify or change the transmission method. Here’s a quick look at what each transmission method means and when to use it.
### Manual (non-auto fax/email)

**Contract Managers** are responsible for physically completing the task of faxing or emailing the PO and any associated documents (quote) to the Vendor.

1. The PO number was provided over the phone or internet, and the vendor *doesn’t* require a copy. **Manual stops KFS workflow and prevents the PO from being transmitted to the Vendor automatically, which would result in a duplicate order.**
2. The PO number was provided over the phone or internet, and the vendor *requests* a copy of the PO or needs additional documentation.
   - When sending a copy of the PO, indicate the following description in the last line item of the PO to prevent duplicate orders: **Confirming order, DO NOT duplicate**

Refer to the document: *How to Print a PO* to print out a copy to send to the vendor.

### Auto Fax or Auto Email

POs are transmitted automatically through Kuali.

1. Preferred choice as this does the work for Contract Managers.
2. Manually change the fax number or email address if the vendor asks the buyer to submit the order directly to a specific person within the vendor’s organization.
If Manual appears, and cannot be changed, that means that a UCIbuy supplier was selected for a Requisition that was generated outside of UCIbuy. Contract Managers cannot change the transmission method in this scenario, and must manually transmit (fax or email) to the PO to the supplier.

D. Payment Terms default to the terms based on the Vendor’s Profile, if they were collected during the onboarding process.
   - Payment Terms to reflect how soon a vendor should be paid (from the date of the vendor’s invoice), only if they differ from the default. For example, the buyer may have negotiated a different term such as 2% 10 days Net 30.

E. The Shipping Title and Shipping Payment Terms default to the terms based on the Vendor’s Profile, if they were collected during the onboarding process. If the field is blank, and terms have been agreed upon with the vendor, use the dropdown boxes to select the appropriate choice.
   - Commonly used Shipping Titles are DESTINATION (title passes to UCI upon delivery—preferred) and ORIGIN (title passes at shipping point).
   - Commonly used Shipping Payment Terms are VENDOR PAYS (“ALLOWED”)—vendor pays the freight cost and it’s not added to the invoice, and INST PAYS (institution), PART OF PO (“PREPAID AND ADD”)—vendor pays the freight cost and adds the cost to the invoice.

Step 8: Validate Items Tab
A. Review and validate information for all line items in the Current Items section such as Quantity, Unit of Measure, Catalog #, Commodity Code, Description, and Unit Cost.
   - Verify that all items are non-restricted.
   - If a restricted item (furniture, radioactives, etc.) is included in the PO, the Contract Manager must delete it from the order. Restricted items must be ordered on a separate PO and cannot be combined with non-restricted items.
     - Review the Purchasing Methods Guide (by Commodity) for more information.
B. Select the button to expand. The Account Number and/or quantities should never be changed at this stage of a PO without express written permission of the end user/Requisition requestor and fiscal officer. This documentation must be added as an attachment to the PO.
**Step 9: Notes and Attachments Tab**

A. In the **Note Text** field, type “upload” to indicate an attachment.
B. In the **Attached File** field, select the **Browse...** 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 **Add** button to complete the file upload.

**Step 10: Save, Calculate, and Approve the Purchase Order**

A. Scroll down and select **save**.
B. Scroll to the end and select **calculate** to update the **Document Description** and **Items** tab with tax and order totals.
C. Lastly, scroll to the end and select **approve**.
D. This completes the PO and brings users back to their **Action List**.
   - Image one displays if there are additional items in the **Action List**.
   - Image two displays an empty **Action List**.