KFS: Purchasing System

KFS Shop Catalog Requisitions (non-catalog requisitions follow)

Shop Catalogs is located in the Procurement & Accounts Payable section of the dashboard (click on that). User will then go into Shop Catalogs to begin the requisition. You could also use the "jump to…" and enter shop catalogs—it will take you to the same page.

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User is able to click on the heart next to any selection to mark it as a favorite. The selection will appear on the main screen when the user logs into Kuali the next time.

After clicking on Shop Catalog, the user will be directed to the Shop Catalogs environment to shop and purchase supplies. When shopping is complete, the cart is returned to Kuali as a requisition and information is auto populated into the requisition. User is still required to input accounting information.

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KFS Shop Catalogs

Profile Setup

Click on the person profile and then click on "View My Profile"

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**Click on "Default User Settings"
and then "Default Addresses"**

Click on "Select Addresses for Profile"

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Enter your 4-digit campus delivery code in the "Nickname/Address Text" Box and then click "Search"

Documents

Reporting

Lynette Brink

User Name   LBRINK@COLOSTATE.EDU

User Profile and Preferences   >
Default User Settings   ⌄
   Custom Field and Accounting Code Defaults
Default Addresses
   Checkout Settings
   Financial Approvers
User Roles and Access   >
Ordering and Approval Settings   >
Permission Settings   >
Notification Preferences   >
User History   >

Default Addresses

⊗ No addresses defined in profile.

Ship To

       ?

Select an address to edit   **Select Addresses for Profile**

⊗ No addresses defined in profile.

Shipping Addresses

Address Search

Nickname / Address Text   6010

Results Per Page   10 ▼

Search

Colorado State University

Click the radio button next to the correct address

Documents

Reporting

Lynette Brink

User Name   LBRINK@COLOSTATE.EDU

User Profile and Preferences   >
Default User Settings   ⌄
    Custom Field and Accounting Code Defaults
    Default Addresses
    Checkout Settings
    Financial Approvers
User Roles and Access   >
Ordering and Approval Settings   >
Permission Settings   >
Notification Preferences   >
User History   >

Default Addresses

❌ No addresses defined in profile.

Ship To

?

Select an address to edit   **Select Addresses for Profile**

❌ No addresses defined in profile.

Shipping Addresses   **Address Search**

Nickname / Address   6010
Text

Results Per Page   10 ▾

Search

Addresses Found: 1   ◄ Page 1 of 1 ►

Name   Address

○ 6010-1   Contact Line 1 Lynette Brink
                   Building:
                   Room Number:
                   Department:
                   Colorado State University
                   200 West Lake Street
                   6010 Campus Delivery
                   Fort Collins, CO 80523-6010
                   United States

Enter your building name, room number and department name in the appropriate boxes. To select this as your default address, click the box. Click "Save" upon completion.

The address will appear in the "Shipping Addresses" box. Follow these steps to create multiple shipping addresses for your profile.

KFS Shop Catalogs

Hosted Catalog Searching (these catalogs don't have a punch-out)

Users can do simple searches in the search field for hosted catalogs from the shop catalogs main screen. Enter your product to search and click go.

Shop | Everything ▾ | beaker | **Go**

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

Shop Catalogs will perform a search and return results based on keyword "beaker". The result will include vendors, category, and manufacturer.

If part number is known, input the part number in the search engine. Click Go.

The search result will filter to known part numbers from the hosted catalog vendors.

Once item has been found, click on "order from supplier".

Shop Everything ▼ | 37-5305v | Go

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

Results for: Everything : 37-5305v

Showing **1 - 1** of 1 Results   Compare Selected: 0

Results Per Page 20 ▼   Sort by: Best Match ▼   ◄ Page 1 of 1 ► ?

Agilent Technologies **VK Verified Beaker, Disnt.,U** from AGILENT TECHNOLOGIES   **Order from Supplier** ⊐

larger image   Part Number   37-5305V   1/EA

Manufacturer Info   37-5305V - (Agilent Technologies)   add favorite | compare

User can Proceed to Checkout and complete shopping or continue shopping.

ABOUT AGILENT ▼   CONTACT US   UNITED STATES   MY ACCOUNT ▼

Agilent | Trusted Answers   All ▼   SEAR

PRODUCTS   SOLUTIONS   TRAINING & EVENTS   SERVICES   SUPPORT   RESOURCES   ORDER CENTER | 🛒

Home > Order Center > Cart

🛒
YOUR CART   ① **BILLING & SHIPPING**   ② **REVIEW & PLACE ORDER**   ③ **ORDER CONFIRMATION**

✉ | ☆ | 🖨 | 🗑

You have 1 item/items in your cart.

Items will remain in your shopping cart for 30 days. You can **check out** or **continue shopping** anytime during that period.

SUBTOTAL of 1 item(s)
$254.15
USD

START CHECK OUT

CREATE QUOTE

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KFS Shop Catalogs

Punch-out Catalogs

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Punch-out Catalogs are listed on the Shop Catalogs Main page. User can click on the vendor logo to go to supplier website to shop.

Once user clicks on the vendor logo…

User is placed within the supplier website to shop. User has same shopping experience as they would in a regular ecommerce site.
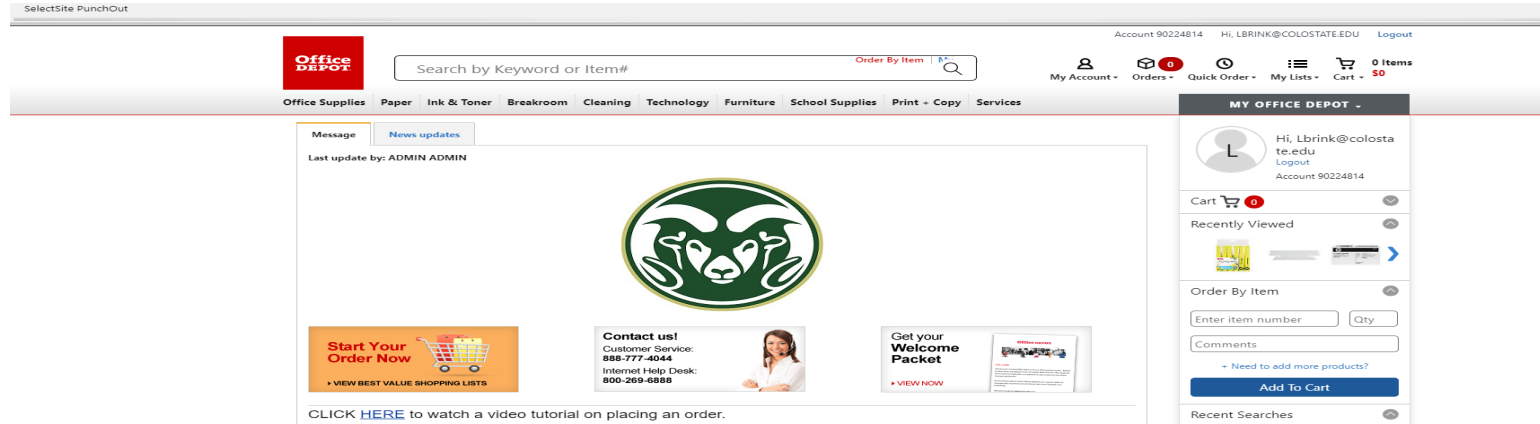
User searches for product listed in the catalog.

Colorado State University
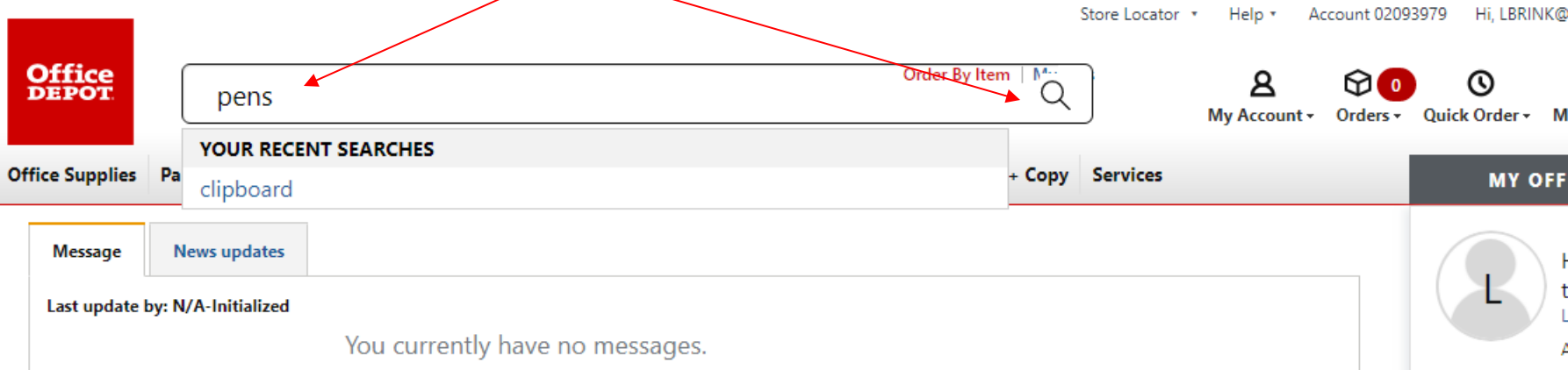
Once item is found, user updates quantity and adds to cart.

When shopping is complete click checkout.

Cart is returned from supplier's website. User may proceed to checkout or click on modify to change.

KFS Shop Catalogs

Checkout Process/KFS Requisition

When completing the checkout process in Shop Catalogs, information stored as a default (shipping address) will auto populate and will allow user a chance to review their cart before submittal to KFS. User will click on Submit Cart to Kuali to populate requisition in KFS.

Orders > Search > Search Documents ⌄ > Summary - Draft Requisition

| ✓ General | ✓ Shipping | ✓ Final Review | . . . . | **Submit Cart to Kuali** |

⟲ Go to Express Checkout   ⟲ Return to shopping cart   ⟲ Continue Shoppin

> ✓ **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 description

General	?	**Shipping**	?
	edit	Shipping address	edit
Cart Name	2019-10-21 LBRINK@COLOSTATE.EDU 01	Contact Line 1 Lynette Brink	
Description	*no value*	Building: Howes Street Business Center	
		Room Number: 108	
		Department: Procurement Services	
		Colorado State University	
		200 West Lake Street	
		6010 Campus Delivery	
		Fort Collins, CO 80523-6010	
		United States	

Supplier / Line Item Details   ?

Hide line details   For selected line items [Add to Favorites ▼] [Go]

Office Depot more info...

The item(s) in this group was retrieved from the supplier's website. What does this mean?
Need to make changes?   MODIFY ITEMS | VIEW ITEMS   Item(s) was retrieved on: 10/21/2019 1:51:08 PM
Line(s): 1

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	☐	
BIC(R) Round Stic Ballpoint Pens, Medium Point, 1.0 mm, Translucent Barrel, Black Ink, Pack Of 60 Pens ⟡ more info...	664011	BX	6.99	1 BX	6.99 USD	☐	edit
Manufacturer Name BIC CORP							
Manufacturer Part Number GSM60-BLACK							
Supplier Part Auxiliary ID 664011							
more info...							

The KFS requisition will auto populate all of the required fields except accounting information. User will input account number, object code and percent and click add to save accounting information.

Vendor Info

Suggested Vendor : Office Depot Inc
Vendor # : 53049-0
Address 1 : 6600 North Military Trail
Address 2 :
Attention :

Customer # :

Notes To Vendor :

Contract Name : Office Depot
Phone Number : 🔍
Fax Number :

City : Boca Raton
State : FL

Postal Code : 33496
Country : United States

Payment Terms : Net 30 Days
Shipping Title : DESTINATION
Shipping Payment Terms : VENDOR PAYS ("ALLOWED")
Contacts : 🔍

Supplier Diversity :

Province :

ITEMS

[Setup Distribution] [Remove Accounts From All Items] [Remove Commodity Codes From All Items] [Expand All Accounts] [Collapse All Accounts]

CURRENT ITEMS

ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	DESCRIPTION	UNIT COST	EXTENDED COST	ACTIONS
QUANTITY	1.00	BX BOX	664011	🔍	BIC(R) Round Stic Ballpoint Pens, Medium Point, 1.0 mm, Translucent Barrel, Black Ink, Pack Of 60 Pens	6.99	6.99	🗑 📇

1

*CHART	*ACCOUNT	SUB-ACCOUNT	*OBJECT	SUB-OBJECT	PROJECT	ORG REF ID	PERCENT	AMOUNT	ACTIONS
CO ▾ Colorado State University	🔍	🔍	🔍	🔍	🔍		100.00		➕

Click "+" to save accounting information

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Once accounting information has been saved, click on submit at bottom of page to forward requisition for account approval and additional approval workflow.

NOTES AND ATTACHMENTS (0)

NOTES AND ATTACHMENTS

Posted Timestamp	Author	* Note Text	Attached File	Send to Vendor?	Notification Recipient	Actions
add:			Choose File No file chosen	▼		add
			CANCEL			

AD HOC RECIPIENTS

ROUTE LOG

Calculate   Submit   Save   Reload   Close   Cancel   Copy

Users can review route log to track what approvals are necessary before a purchase order is created and sent to vendor.

ID: 1557696   ▼ hide

Title	Requisition - 2012-02-27 SWAROJ 04		
Type	Requisition	Created	02:44 PM 02/27/2012
Initiator	Swaro, John Joseph	Last Modified	03:04 PM 02/27/2012
Status	SAVED	Last Approved	
Node(s)	AdHoc	Finalized	

Actions Taken   ▼ hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	Swaro, John Joseph		02:44 PM 02/27/2012	

Pending Action Requests   ▼ hide

	Action	Requested Of	Time/Date	Annotation
▶ show	IN ACTION LIST COMPLETE	Swaro, John Joseph	02:44 PM 02/27/2012	

Future Action Requests   ▼ hide

	Action	Requested Of	Time/Date	Annotation
▶ show	PENDING APPROVE	Krappes, Louis Frank	03:04 PM 02/27/2012	KFS-SYS Fiscal Officer 1357020 CO

Non-Catalog Requisitions

"No Quantity" and "Quantity" Requisitions

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No Quantity Requisitions

- "No Quantity" requisitions are used for open and service purchase orders

- Receiving is not required

- Multiple payments can be made

HOME

Jump to...   Ctrl+K

ACCOUNTING

ACCOUNTS RECEIVABLE

AUTOMATED JOURNAL VOUCHER

BALANCE INQUIRIES

BUDGET CONSTRUCTION

CAPITAL ASSETS

CHART OF ACCOUNTS

PRE-DISBURSEMENT

PROCUREMENT & ACCOUNTS PAYABLE

SYSTEM

TRAVEL

VENDOR

1099

BFS ADMINISTRATION

HELP

ABOUT

Procurement & Accounts Payable

ACTIVITIES

Contract Manager Assignment

Disbursement Voucher

Line Item Receiving

Requisition

Shop Catalogs

REFERENCE

Training- Capital Asset Tab

ADMINISTRATION

Procurement Cardholder   ♥

Billing Address

Bulk Receiving

CapitalAssetSystemState

Capital Asset System Type

Carrier

Delivery Required Date Reason

Disbursement Voucher Payment Reason

Electronic Invoice Item Mapping

Funding Source

Item Reason Added

Item Type

Method of PO Transmission

Negative Payment Request Approval Limit

Organization Parameter

Payment Request Auto Approve Exclusions

Purchase Order Contract Language

Purchase Order Quote Language

Purchase Order Quote List

Purchase Order Quote Status

Purchase Order Vendor Choice

Receiving Address

Click here to start the process of creating a requisition

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Requisition

Upon entering the requisition, a document and requisition number are created. Make note of the document number for searching later.

Doc Nbr: 20761157
Initiator: lbrink@colostate.edu
Requisition #: Not Available

Status: INITIATED
Created: 02:59 PM 10/21/2019
Requisition Doc Status: In Process

EXPAND ALL   **COLLAPSE ALL**

DOCUMENT OVERVIEW

OVERVIEW

* Description:

Organization Document Number:

Explanation:

FINANCIAL DOCUMENT DETAIL

* Year: 2020

This is a required field for all requisitions. For requisitions over $10,000, the description will be changed to reflect the last name of the Purchasing Agent that is assigned the requisition.

REQUISITION DETAIL

* Chart/Org: CO / 6010

Receiving Required:

* Funding Source: INSTITUTION ACCOUNT ▾

Payment Request Positive Approval Required:

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REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍   * Funding Source : INSTITUTION ACCOUNT ▾

Receiving Required : ☐   Payment Request Positive Approval Required : ☐

Account Distribution Method : Proportional

DELIVERY   ∧

FINAL DELIVERY

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.

* Delivery Campus : MC - CSU Main Campus 🔍   * Delivery To : Brink, Lynette 🔍

Building : 🔍 [building not found] [set as default building]   Phone Number : 970-491-5105

* Address 1 :   Email : Lynette.Brink@colostate.edu

Address 2 : [   ]

* Room : [   ]

* City :

State :   Delivery Instructions : [   ]

Postal Code :

* Country :

RECEIVING ADDRESS

6010-1

This is the screen you will get after clicking on the magnifying glass.

Building Lookup ⚙

Campus Code: Building Code:
MC   🔍

Building Name: Active Indicator:
                                      ● Yes   ○ No   ○ Both

                    Search   Clear   Cancel

Enter your building name using asterisk on both sides of the building name. In Kuali, less is more. For example, enter *Howes* instead of Howes Street Business Center and click "search."

Building Lookup ❔

Campus Code:
MC 🔍

Building Code:

Building Name:
Howes

Active Indicator:
◉ Yes   ○ No   ○ Both

Search   Clear   Cancel

Colorado State University

Click "return value."

Building Lookup ⓘ

Campus Code:
`MC` 🔍

Building Code:
[   ]

Building Name:
`*Howes*`

Active Indicator:
● Yes ○ No ○ Both

[Search] [Clear] [Cancel]

Search Results

1-1 of 1

Return Value	Campus Code	Building Code	Building Name	Active Indicator
return value	MC	0926	Howes Street Business Center	Yes

Export options: CSV | spreadsheet | XML

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REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍

Receiving Required : ☐

Account Distribution Method : Proportion

* Funding Source : INSTITUTION ACCOUNT ▼

Payment Request Positive Approval Required : ☐

Enter your room number and click "set as default building."

DELIVERY

FINAL DELIVERY

* Delivery Campus : MC - CSU Main Campus 🔍

Building : Howes Street Business Center 🔍 [building not found] [set as default building]

* Address 1 : 555 S. HOWES ST

Address 2 : [_____]

* Room : [_____] 🔍

* City : FORT COLLINS

State : CO

Postal Code : 80523

* Country : United States

* Delivery To : Brink, Lynette 🔍

Phone Number : 970-491-5105

Email : Lynette.Brink@colostate.edu

Delivery Instructions : [_____]

RECEIVING ADDRESS

6010-1

Doc No : 2973113?
Initiator : lbrink@colostate.edu
Requisition : Not Available
Status : INITIATED
Created : 02:59 PM 10/21/2019
Requisition Doc Status : In Process

Requisition ❓

- The building has been saved for use on future documents.

You will not need to set your default address again. Please note, it is the receiving address that will dictate the location of delivery.

EXPAND ALL   **COLLAPSE ALL**

DOCUMENT OVERVIEW ⌄

OVERVIEW

* Description : [   ]

Organization Document Number : [   ]

Explanation : [   ]

FINANCIAL DOCUMENT DETAIL

* Year :   2020

Total Amount :

REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍

Receiving Required : ☐

Account Distribution Method : Proportional

* Funding Source : [INSTITUTION ACCOUNT ▾]

Payment Request Positive Approval Required : ☐

DELIVERY ⌄

FINAL DELIVERY

Calculate   Submit   Save   Close   Cancel

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

Vendor Lookup ❓

Vendor Name:
kansas state

US Tax Number:

Vendor #:

Active Indicator:
● Yes ○ No ○ Both

Vendor Type:
PO - PURCHASE ORDER ▼ 🔍

State:

Commodity Code:

Supplier Diversity:
▼ 🔍

Search   Clear   Cancel

Receiving Address : 200 West Lake Street
6010 Campus Delivery
Fort Collins , CO 80523-6010
United States

ADDRESS TO VENDOR

> If you do not see the address you need, click on the magnifying glass.

VENDOR

Vendor Address

Suggested Vendor : Kansas State Univ   clear vendor

Vendor # : 7158-0

Address 1 : Kansas State Univ Livestock Judging

Address 2 : 124 Weber Hall

Attention : Chris Mullinix

Vendor Info

Customer # :

Notes To Vendor :

Contract Name :

Phone Number :

Fax Number :

City : Manhattan

State : KS

Province :

Postal Code : 66506

Country : United States

Payment Terms : Net 30 Days

Shipping Title :

Shipping Payment Terms :

Contacts :

Other

Supplier Diversity : Small Disadvantaged Business
Large Business

After clicking on the magnifying glass, this is what you will see if there are multiple addresses for a vendor. Click "return value" on the address you need. This should be the purchase order address versus the remit address.

Search Results

Return Value	Address Type Description	Address 1	Address 2	State	City	Postal Code	Country	Vendor Fax Number	Active Indicator
return value	REMIT	Dept Of Agronomy	Foundation Seed Project 2200 Kimball Ave	KS	Manhattan	66502	US		Yes
return value	PURCHASE ORDER	Plant Disease Diagnostic Lab	4032 Throckmorton Hall	KS	Manhattan	66506-5504	US		Yes
return value	REMIT	Extension Div	Umberger Hall	KS	Manhattan	66506	US		Yes
return value	PURCHASE ORDER	Coop Extension Services	242 Waters Hall	KS	Manhattan	66506	US		Yes
return value	REMIT	Dept Of Agronomy	Throckmorton Hall	KS	Manhattan	66506-5504	US		Yes
return value	PURCHASE ORDER	Engineering Exten Program	133 Ward Hall	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Engineering Extension Programs	Account #535633	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Business Office Accts Recv	Dept Of Diagnostic Med K218 Mosier	KS	Manhattan	66506-5700	US		Yes
return value	REMIT	Extension Div	Dept Of Ag Economics 304 Waters Hall	KS	Manhattan	66506-4026	US		Yes
return value	REMIT	Animal Science	243 Weber	KS	Manhattan	66506	US		Yes
return value	REMIT	Engineering Extension Programs	Acct # 535762 133 Ward Hall	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Coop Extension Svcs	241 Weber Hall	KS	Manhattan	66506	US		Yes
return value	REMIT	Engineering Ext Programs	Account #535850	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Rural Clearinghouse	Education & Development 111 College Cou	KS	Manhattan	66506-5312	US		Yes
return value	REMIT	Ext Agricultural Economist	Dept Of Agricultural Economics, 304 Wate	KS	Manhattan	66506	US		Yes
return value	REMIT	Foundation	Extension Foods & Nutrition, 244 Junstin	KS	Manhattan	66506-1407	US		Yes
return value	REMIT	Ksu Extension Division	304 Waters Hall	KS	Manhattan	66506-4026	US		Yes
return value	REMIT	Division Of Continuing Ed	Distance Learning Prog 226 College C	KS	Manhattan	66506-6007	US		Yes
return value	REMIT	Dept Of Clinical Sciences	Vcs Bldg	KS	Manhattan	66506	US		Yes
return value	REMIT	Dept Of Communication	301 Umberger Hall	KS	Manhattan	66506-3402	US		Yes
return value	REMIT	Fort Hays Branch	Agri Experiment Station	KS	Hays	67601	US		Yes
return value	REMIT	Northwest Research Ext Ctr	105 Experiment Farm Rd	KS	Colby	67701-1697	US	(785) 462-2315	Yes
return value	REMIT	Agricultural Research Center	1232 240th Ave	KS	Hays	67601-9228	US		Yes
return value	REMIT	Attn Lance Huck	116 Weber Hall	KS	Manhattan	66506-0202	US		Yes
return value	REMIT	Rffit/Dean Vet Med	Vet Diagnosis Dept Vet Clinical Sci Bld	KS	Manhattan	66506	US		Yes
return value	PURCHASE ORDER	Dept Of Vet Med Diag		KS	Manhattan	66506	US		Yes

This is the vendor with the correct address.

VENDOR

Vendor Address

Suggested Vendor : Kansas State Univ 🔍 [clear vendor]

Vendor # : 7158-0

Address 1 : Physics-James R McDonald Lab 🔍

Address 2 : 116 Cardwell Hall

Attention : Lindsay Thompson

City : Manhattan

State : KS

Province :

Postal Code : 66506

Country : United States ▾

Vendor Info

Customer # : 🔍

Notes To Vendor :

Contract Name : 🔍

Phone Number : 🔍

Fax Number :

Payment Terms : Net 30 Days

Shipping Title :

Shipping Payment Terms :

Contacts : 🔍

Other

Supplier Diversity : Small Disadvantaged Business

Large Business

ADDITIONAL SUGGESTED VENDOR NAMES

Vendor Name 1 :

Vendor Name 2 :

Vendor Name 3 :

Vendor Name 4 :

Vendor Name 5 :

Calculate   Submit   Save   Close   Cancel

Vendor Name 5 :

ITEMS

ADD ITEM ⓘ Import Templates

IMPORT LINES

*ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	*DESCRIPTION	*UNIT COST	EXTENDED COST	RESTRICTED	ASSIGNED TO TRADE IN	ACTIONS
NO QUANTIT ▾		🔍		🔍			0.00	☐	☐	➕

Setup Distribution   Remove Accounts From All Items   Remove Commodity Codes From All Items   Expand All Accounts   Collapse All Accounts

CURRENT ITEMS

No items added to document

TOTALS

"No Quantity" requisitions are used for open and service purchase orders. Do not input anything in the quantity, UOM, catalog # or commodity code boxes.

CAPITAL ASSET

Colorado State University

To add accounting at the line, click the "show" button.

Input your account number, object code, percent or dollar amount and click the "add" button. If you are using percentages, be sure they add up to 100.

VIEW PAYMENT HISTORY

NOTES AND ATTACHMENTS (0)

NOTES AND ATTACHMENTS

Posted Timestamp	Author	* Note Text	Attached File	Send to Vendor?	Notification Recipient	Actions
add:		This is where you would add backup documentation such as a contract, quote, etc.	Choose File No file chosen	Yes ▾		add
			CANCEL			

AD HOC RECIPIENTS

ROUTE LOG

This is where you can add a quote or note for the vendor or Purchasing Agent. A note must be entered anytime an attachment is added to a requisition. To attach a file, click on "choose file" and go to the location of where the file is saved on your computer. If you want a note or quote to be sent to the vendor, select "yes" from the drop down menu. The note will accompany the attachment to the vendor.

To see the workflow approvals for your requisition, click the "arrow" button under the "route log" tab.

Route Log

refresh

ID: 20761175 [▼ hide]

Title			
Type	Requisition	**Created**	11:34 AM 10/22/2019
Initiator	Brink, Lynette	**Last Modified**	11:34 AM 10/22/2019
Route Status	INITIATED	**Last Approved**	
Document Status	In Process	**Document Status Modified**	11:34 AM 10/22/2019
Node(s)	AdHoc	**Finalized**	

Future Action Requests [▶ show]

| Calculate | Submit | Save | Close | Cancel |

Click the "submit" button to start the workflow approval process for your document.

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Requisition ⍰

3 error(s) found on page.

Status: INITIATED
Created: 03:07 PM 10/22/2019
Requisition Doc Status: In Process

...9
...lostate.edu
...able

> If your document was not successfully submitted, you will receive a red error message. The errors that need your attention will be marked in red at the location of the error (for example, if you have an accounting line error, a red error will appear in the "items" box). The errors will need to be corrected before you can resubmit.

EXPAND ALL   COLLAPSE ALL

DOCUMENT OVERVIEW   ⌃

OVERVIEW

* Description: [Purchasing Agent's Last Name]   Explanation: [   ]

Organization Document Number: [   ]

FINANCIAL DOCUMENT DETAIL

* Year: 2020   Total Amount: 7,500.00

REQUISITION DETAIL

* Chart/Org: CO / 6010 🔍   * Funding Source: [INSTITUTION ACCOUNT ▾]
Receiving Required: ☐   Payment Request Positive Approval Required: ☐
Account Distribution Method: Proportional

DELIVERY   ⌃

Quantity Requisitions

- "Quantity" requisitions are to be used for goods only
- You must line out each item as it appears on your quote
- Receiving is required over $5000
- Multiple payments can be made when partial shipments are received

Upon entering the requisition, a document and requisition number are created. Make note of the document number for searching later.

This is a required field for all requisitions. For requisitions over $10,000, the description will be changed to reflect the last name of the Purchasing Agent that is assigned the requisition.

Requisition

Doc Nbr : 20761179
Initiator : lbrink@colostate.edu
Requisition # : Not Available

Status : INITIATED
Created : 03:07 PM 10/22/2019
Requisition Doc Status : In Process

EXPAND ALL   COLLAPSE ALL

DOCUMENT OVERVIEW

OVERVIEW

* Description : Purchasing Agent's Last Name
Organization Document Number :

FINANCIAL DOCUMENT DETAIL

* Year : 2020   Total Amount :

REQUISITION DETAIL

* Chart/Org : CO / 6010   * Funding Source : INSTITUTION ACCOUNT ▼
Receiving Required : ☐   Payment Request Positive Approval Required : ☐
Account Distribution Method : Proportional

DELIVERY

FINAL DELIVERY

Calculate   Submit   Save   Close   Cancel

Colorado State University

REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍   * Funding Source : INSTITUTION ACCOUNT ▾
Receiving Required : ☐   Payment Request Positive Approval Required : ☐
Account Distribution Method : Proportional

DELIVERY   ⌄

FINAL DELIVERY

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."

* Delivery Campus : MC - CSU Main Campus 🔍   * Delivery To : Brink, Lynette   🔍

Building : 🔍 [...ing not found]   Phone Number : 970-491-5105

* Address 1 : [   ]   Email : Lynette.Brink@colostate.edu

Address 2 : [   ]

* Room : [   ]

* City : [   ]

State : [   ]   Delivery Instructions : [   ]

Postal Code : [   ]

* Country : [▾]

RECEIVING ADDRESS

This is the screen you will get after clicking on the magnifying glass.

Building Lookup ❓

Campus Code:
`MC` 🔍

Building Code:
[   ]

Building Name:
[   ]

Active Indicator:
◉ Yes   ○ No   ○ Both

[Search] [Clear] [Cancel]

Colorado State University

Enter your building name using an asterisk on both sides of the building name. In Kuali, less is more. For example, enter *Howes* instead of Howes Street Business Center and click "search."

Building Lookup ❔

Campus Code:
MC 🔍

Building Code:

Building Name:
Howes

Active Indicator:
◉ Yes   ○ No   ○ Both

Search   Clear   Cancel

Colorado State University

Click "return value."

Building Lookup ⓘ

Campus Code:
`MC`

Building Code:

Building Name:
`*Howes*`

Active Indicator:
◉ Yes　○ No　○ Both

Search　Clear　Cancel

Search Results

1-1 of 1

Return Value	Campus Code	Building Code	Building Name	Active Indicator
return value	MC	0926	Howes Street Business Center	Yes

Export options: CSV | spreadsheet | XML

Colorado State University

Requisition ❓

- The building has been saved for use on future documents. ← You will not need to set your default address again.

[EXPAND ALL] [COLLAPSE ALL]

DOCUMENT OVERVIEW ⌃

OVERVIEW

* Description : `Purchasing Agent's Last Name`

Explanation : [   ]

Organization Document Number : [   ]

FINANCIAL DOCUMENT DETAIL

* Year : 2020

Total Amount :

REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍

* Funding Source : `INSTITUTION ACCOUNT ▾`

Receiving Required : ☐

Payment Request Positive Approval Required : ☐

Account Distribution Method : Proportional

DELIVERY ⌃

FINAL DELIVERY

Colorado State University

Search for a vendor by clicking on the magnifying glass.

VENDOR

Vendor Address

Suggested Vendor : [   ] 🔍 clear vendor   City : [   ]

Vendor # :   State : [   ]

Address 1 : [   ]   Province :   [   ]

Address 2 : [   ]   Postal Code : [   ]

Attention : [   ]   Country : [▾]

Vendor Info

Customer # : [   ]

                                          Payment Terms :

Notes To Vendor : [   ]   Shipping Title :

                                          Shipping Payment Terms :

Contract Name : 🔍   Contacts :

Phone Number :

Fax Number : [   ]   Supplier Diversity :

ADDITIONAL SUGGESTED VENDOR NAMES

Vendor Name 1 : [   ]

Vendor Name 2 : [   ]

Colorado State University

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

Vendor Lookup ●

Vendor Name:
kansas state

US Tax Number:

Vendor #:

Active Indicator:
● Yes   ○ No   ○ Both

Vendor Type:
PO - PURCHASE ORDER ▼ 🔍

State:

Commodity Code:

Supplier Diversity:
▼ 🔍

Search   Clear   Cancel

Vendor Lookup ⊙

Vendor Name:
`*kansas state*`

US Tax Number:

Active Indicator:
● Yes ○ No ○ Both

State:

`PO - PURCHASE ORDER` ▼ 🔍

Commodity Code:
🔍

Supplier Diversity:
▼ 🔍

Click "return value" to select your vendor.

Search   Clear   Cancel

Search Results

1-7 of 7

Return Value	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commodity Codes	Vendor Supplier Diversity
return value	K State Livestock Judging Camp	Kansas State Livestock Judging	57828-0	Yes	PO	KANSAS		
return value	Kansas State Univ	K-STATE RESEARCH AND EXTENSION KANSAS STATE UNIV OFFICE OF ED INNOVATI...	7158-0	Yes	PO	KANSAS		Other, Large Business
return value	Kansas State Univ > Great Plains I D E A Lead Inst	GREAT PLAINS I D E A LEAD INST	7158-2	Yes	PO	KANSAS		Other, Large Business
return value	Kansas State Univ > Kansas Forest Service		7158-4	Yes	PO	KANSAS		Other, Large Business
return value	Kansas State Univ > Kansas State Univ K S V D L	Kansas State Veterinary Diagnostic Lab	7158-5	Yes	PO	KANSAS		Other, Large Business
return value	Kansas State Univ > Kansas State University Global Campus		7158-3	Yes	PO	KANSAS		Other, Large Business
return value	Kansas State Univ > Konza Prairie	KONZA PRAIRIE	7158-1	Yes	PO	KANSAS		Other, Large Business

Export options: CSV | spreadsheet | XML

Colorado State University

200 West Lake Street
Receiving Address : 6010 Campus Delivery
Fort Collins , CO 80523-6010
United States

ADDRESS TO VENDOR

If you do not see the address you need, click on the magnifying glass.

VENDOR

Vendor Address

Suggested Vendor : Kansas State Univ   clear vendor

Vendor # : 7158-0

Address 1 : Kansas State Univ Livestock Judging

Address 2 : 124 Weber Hall

Attention : Chris Mullinix

City : Manhattan

State : KS

Province :

Postal Code : 66506

Country : United States

Vendor Info

Customer # :

Notes To Vendor :

Contract Name :

Phone Number :

Fax Number :

Payment Terms : Net 30 Days

Shipping Title :

Shipping Payment Terms :

Contacts :

Other

Supplier Diversity : Small Disadvantaged Business
Large Business

After clicking on the magnifying glass, this is what you will see if there are multiple addresses for a vendor. Click "return value" on the address you need. This should be the purchase order address versus the remit address.

Search Results

Return Value	Address Type Description	Address 1	Address 2	State	City	Postal Code	Country	Vendor Fax Number	Active Indicator
return value	REMIT	Dept Of Agronomy	Foundation Seed Project 2200 Kimball Ave	KS	Manhattan	66502	US		Yes
return value	PURCHASE ORDER	Plant Disease Diagnostic Lab	4032 Throckmorton Hall	KS	Manhattan	66506-5504	US		Yes
return value	REMIT	Extension Div	Umberger Hall	KS	Manhattan	66506	US		Yes
return value	PURCHASE ORDER	Coop Extension Services	242 Waters Hall	KS	Manhattan	66506	US		Yes
return value	REMIT	Dept Of Agronomy	Throckmorton Hall	KS	Manhattan	66506-5504	US		Yes
return value	PURCHASE ORDER	Engineering Exten Program	133 Ward Hall	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Engineering Extension Programs	Account #535633	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Business Office Accts Recv	Dept Of Diagnostic Med K218 Mosier	KS	Manhattan	66506-5700	US		Yes
return value	REMIT	Extension Div	Dept Of Ag Economics 304 Waters Hall	KS	Manhattan	66506-4026	US		Yes
return value	REMIT	Animal Science	243 Weber	KS	Manhattan	66506	US		Yes
return value	REMIT	Engineering Extension Programs	Acct # 535762 133 Ward Hall	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Coop Extension Svcs	241 Weber Hall	KS	Manhattan	66506	US		Yes
return value	REMIT	Engineering Ext Programs	Account #535850	KS	Manhattan	66506-2508	US		Yes
return value	REMIT	Rural Clearinghouse	Education & Development 111 College Cou	KS	Manhattan	66506-5312	US		Yes
return value	REMIT	Ext Agricultural Economist	Dept Of Agricultural Economics, 304 Wate	KS	Manhattan	66506	US		Yes
return value	REMIT	Foundation	Extension Foods & Nutrition, 244 Junstin	KS	Manhattan	66506-1407	US		Yes
return value	REMIT	Ksu Extension Division	304 Waters Hall	KS	Manhattan	66506-4026	US		Yes
return value	REMIT	Division Of Continuing Ed	Distance Learning Prog 226 College C	KS	Manhattan	66506-6007	US		Yes
return value	REMIT	Dept Of Clinical Sciences	Vcs Bldg	KS	Manhattan	66506	US		Yes
return value	REMIT	Dept Of Communication	301 Umberger Hall	KS	Manhattan	66506-3402	US		Yes
return value	REMIT	Fort Hays Branch	Agri Experiment Station	KS	Hays	67601	US		Yes
return value	REMIT	Northwest Research Ext Ctr	105 Experiment Farm Rd	KS	Colby	67701-1697	US	(785) 462-2315	Yes
return value	REMIT	Agricultural Research Center	1232 240th Ave	KS	Hays	67601-9228	US		Yes
return value	REMIT	Attn Lance Huck	116 Weber Hall	KS	Manhattan	66506-0202	US		Yes
return value	REMIT	Rffit/Dean Vet Med	Vet Diagnosis Dept Vet Clinical Sci Bld	KS	Manhattan	66506	US		Yes
return value	PURCHASE ORDER	Dept Of Vet Med Diag		KS	Manhattan	66506	US		Yes

Colorado State University

This is the vendor with the correct address.

VENDOR

Vendor Address

Suggested Vendor : Kansas State Univ 🔍 [clear vendor]

Vendor # : 7158-0

Address 1 : Physics-James R McDonald Lab 🔍

Address 2 : 116 Cardwell Hall

Attention : Lindsay Thompson

City : Manhattan

State : KS

Province :

Postal Code : 66506

Country : United States ▼

Vendor Info

Customer # : 🔍

Notes To Vendor :

Contract Name : 🔍

Phone Number : 🔍

Fax Number :

Payment Terms : Net 30 Days

Shipping Title :

Shipping Payment Terms :

Contacts : 🔍

Other

Supplier Diversity : Small Disadvantaged Business
Large Business

ADDITIONAL SUGGESTED VENDOR NAMES

Vendor Name 1 :

Vendor Name 2 :

Vendor Name 3 :

Vendor Name 4 :

Vendor Name 5 :

Calculate   Submit   Save   Close   Cancel

ITEMS ∧

ADD ITEM ❓ Import Templates   IMPORT LINES

* ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	* DESCRIPTION	* UNIT COST	EXTENDED COST	RESTRICTED	ASSIGNED TO TRADE IN	ACTIONS
QUANTITY ▼		🔍		🔍			0.00	☐	☐	➕

Setup Distribution | Remove Accounts From All Items | Remove Commodity Codes From All Items | Expand All Accounts | Collapse All Accounts

CURRENT ITEMS

No items adde

TOTALS

You must input a quantity, UOM, description, unit cost and then click "add." If you do not know the UOM, click on the magnifying glass in the UOM box to be able to search appropriate codes.

Grand Total :   0.00
APO Limit :   10,000.00

Colorado State University

This is the screen you will see after you click on the magnifying glass in the UOM box.

Unit Of Measure Lookup ❓

Item Unit Of Measure Code:

Item Unit Of Measure Description:

Active Indicator:
⦿ Yes   ○ No   ○ Both

Search   Clear   Cancel

Colorado State University

Enter the unit of measure using an asterisk on both sides of the measurement and click "search." The search will populate values, click "return value" next to the correct unit of measure.

Unit Of Measure Lookup ⊙

Item Unit Of Measure Code:

Item Unit Of Measure Description:
each

Active Indicator:
◉ Yes   ○ No   ○ Both

[Search] [Clear] [Cancel]

Search Results

1-1 of 1

Return Value	Item Unit Of Measure Code	Item Unit Of Measure Description	Active Indicator
return value	EA	EACH	Yes

Export options: CSV | spreadsheet | XML

For header funding that will be applied to all lines of the requisition, click the "setup distribution" button. 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 item funding.

After clicking "setup distribution," "Accounting Lines" will appear. Enter the account number, object code, percent or dollar amount and click "add." You can add multiple header accounting lines but the percent must be equal 100. Click "distribute to items" when you have added all of your header funding accounting lines.

Requisition ⓘ

- Accounts were distributed successfully to line items where no accounts existed.

This message will appear after clicking on "distribute to items." You will not get this message with funding at the line.

EXPAND ALL | COLLAPSE ALL

DOCUMENT OVERVIEW ⌃

OVERVIEW

* Description : Purchasing Agent's Last Name

Organization Document Number :

Explanation :

FINANCIAL DOCUMENT DETAIL

* Year : 2020

Total Amount :

REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍

Receiving Required : ☐

Account Distribution Method : Proportional

* Funding Source : INSTITUTION ACCOUNT ▾

Payment Request Positive Approval Required : ☐

DELIVERY ⌃

FINAL DELIVERY

Calculate | Submit | Save | Close | Cancel

VIEW RELATED DOCUMENTS ⌄

VIEW PAYMENT HISTORY ⌄

NOTES AND ATTACHMENTS (0) ⌃

NOTES AND ATTACHMENTS

Posted Timestamp	Author	* Note Text	Attached File	Send to Vendor?	Notification Recipient	Actions
add:		This is where you would add backup documentation such as contract, quote, etc.	Choose File No file chosen	▾		add
			CANCEL			

AD HOC RECIPIENTS ⌄

ROUTE LOG ⌄

Calculate   Submit   Save   Close   Cancel

This is where you can add a quote or note for the vendor or Purchasing Agent. A note must be entered anytime an attachment is added to a requisition. To attach a file, click on "choose file" and go to the location of where the file is saved on your computer. If you want a note or quote to be sent to the vendor, select "yes" from the drop down menu (do not send internal notes). You should only send quotes for under $10,000 to the vendor. If the requisition is routing to Procurement (over $10,000), do not select yes to send to the vendor. The purchasing agent will do this step. The note will accompany the attachment to the vendor.

NOTES AND ATTACHMENTS

Posted Timestamp	Author	* Note Text	Attached File	Send to Vendor?	Notification Recipient	Actions
add:		This is where you would add backup documentation such as contract, quote, etc.	Choose File No file chosen	▾		add
			CANCEL			

AD HOC RECIPIENTS ⌄

ROUTE LOG ⌄

To see the workflow approvals for your requisition, click the "open" button on the "Route Log" tab.

ROUTE LOG

Route Log

refresh

ID: 20761179 ▾ hide

Title			
Type	Requisition	**Created**	03:07 PM 10/22/2019
Initiator	Brink, Lynette	**Last Modified**	03:07 PM 10/22/2019
Route Status	INITIATED	**Last Approved**	
Document Status	In Process	**Document Status Modified**	03:07 PM 10/22/2019
Node(s)	AdHoc	**Finalized**	

Future Action Requests ▸ show

| Calculate | Submit | Save | Close | Cancel |

Click the "submit" button to start the workflow approval process for your document.

Requisition ⓘ

3 error(s) found on page.
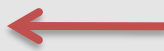
> If your document was not successfully submitted, you will receive a red error message. The errors that need your attention will be marked in red at the location of the error (for example if you have an accounting line error, a red error message will appear in the "items" box. The errors will need to be corrected before you can resubmit.

EXPAND ALL   COLLAPSE ALL

DOCUMENT OVERVIEW   ∧

OVERVIEW

* Description : [Purchasing Agent's Last Name]   Explanation : [   ]

Organization Document Number : [   ]

FINANCIAL DOCUMENT DETAIL

* Year : 2020   Total Amount : 7,500.00

REQUISITION DETAIL

* Chart/Org : CO / 6010 🔍   * Funding Source : [INSTITUTION ACCOUNT ▾]

Receiving Required : ☐   Payment Request Positive Approval Required : ☐

Account Distribution Method : Proportional

DELIVERY   ∧

Colorado State University

Importing Quotes – Requisitions

Quote must be a CSV file.

Colorado State University

CSV Import Parameters

Quantity	UOM	Catalog #	Commodity Code	Description	Unit Cost
1	ea	2076-524		IBM Storwize V7000 SFF Control	8960.00
1	ea	1173		Storwize V7000U Indicator	0.00
8	ea	5305		5m Fiber Cable (LC)	36.77
1	ea	9730		Power Cord - PDU connection	8.27
1	ea	AGBH		Shipping and Handling 524	113.72

Note:

1. Be sure CSV file is setup in the format above.
2. Leave the "Commodity Code" column blank in your CSV file.
3. Do not use dollar sign in "Unit Cost" field.
4. Remove row with descriptors (i.e., Quantity, UOM, Catalog #, etc.) before uploading

Colorado State University

Complete the "Document overview," "Delivery," and "Vendor " tabs like any other requisition.

To import your quote, click "import lines."

Vendor Name 4 :
Vendor Name 5 :

ITEMS   ⌃

ADD ITEM ❓ Import Templates   IMPORT LINES

* ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	* DESCRIPTION	* UNIT COST	EXTENDED COST	RESTRICTED	ASSIGNED TO TRADE IN	ACTIONS
QUANTITY ▾		🔍		🔍			0.00	☐	☐	➕

Setup Distribution   Remove Accounts From All Items   Remove Commodity Codes From All Items   Expand All Accounts   Collapse All Accounts

CURRENT ITEMS

No items added to document

TOTALS

Grand Total :   0.00
APO Limit :   10,000.00

Click "choose file," locate the document on your computer , and then click "add." This will import your itemized quote into the requisition.

ITEMS   ^

ADD ITEM ❓ Import Templates   Choose File   No file chosen   ADD   Cancel

* ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	* DESCRIPTION	* UNIT COST	EXTENDED COST	RESTRICTED	ASSIGNED TO TRADE IN	ACTIONS
QUANTITY ▼		🔍		🔍	✏️		0.00	☐	☐	➕

Setup Distribution   Remove Accounts From All Items   Remove Commodity Codes From All Items   Expand All Accounts   Collapse All Accounts

CURRENT ITEMS

No items added to document

TOTALS

Grand Total :   0.00

Fiscal Year Requisitions

Between April and June, Initiators need to select the appropriate fiscal year from a drop down box here. Otherwise, the fiscal year will default to the current one. Follow the steps for either a "no quantity" or "quantity" requisition.

Data Entry Fields to Avoid in the Requisition

Do not include information in the "Delivery Instructions" field as this information will not appear on the face of the Purchase Order for a vendor to view. Any instructions to a vendor should be included in the "Notes and Attachments" area towards the bottom of the Requisition.

* Chart/Org : CO / 6010 🔍

* Funding Source : INSTITUTION ACCOUNT ▼

Receiving Required : ☐

Payment Request Positive Approval Required : ☐

Account Distribution Method : Proportional

DELIVERY ⌃

FINAL DELIVERY

* Delivery Campus : MC - CSU Main Campus 🔍

* Delivery To : Brink, Lynette   🔍

Building : Howes Street Business Center 🔍 [building not found] [set as default building]

Phone Number : 970-491-5105

* Address 1 : 555 S. HOWES ST.

Email : Lynette.Brink@colostate.edu

Address 2 :

* Room : 108 🔍

* City : FORT COLLINS

State : CO

Delivery Instructions :

Postal Code : 80523

* Country : United States

RECEIVING ADDRESS

6010-1
200 West Lake Street

Including information in the "Additional Suggested Vendor Names" will cause the requisition to enter an error queue or route to Procurement when it normally wouldn't.

Colorado State University

Selecting the "Restricted" field will cause the requisition to enter an error queue because the information will be invisible.

ITEMS ⌃

ADD ITEM ❓ Import Templates

IMPORT LINES

*ITEM TYPE	QUANTITY	UOM	CATALOG #	COMMODITY CODE	*DESCRIPTION	*UNIT COST	EXTENDED COST	RESTRICTED	ASSIGNED TO TRADE IN	ACTIONS
QUANTITY ▾		🔍		🔍	🖉		0.00	☐	☐	➕

Setup Distribution   Remove Accounts From All Items   Remove Commodity Codes From All Items   Expand All Accounts   Collapse All Accounts

CURRENT ITEMS

No items added to document

TOTALS

Using the "PO Total Cannot Exceed" field will cause the requisition to enter an error queue in Procurement.

ADDITIONAL INSTITUTIONAL INFO

* Method of PO Transmission : ELECTRONIC ▼

* Cost Source : ESTIMATE

Contact Name :

Contact Phone :

Contact Email :

PO Total Cannot Exceed :

* Requestor Name : Brink, Lynette

* Requestor Phone : 970-491-5105

* Requestor Email : Lynette.Brink@colostate.edu

Reference 1 :

Reference 2 :

Reference 3 :

ACCOUNT SUMMARY

VIEW RELATED DOCUMENTS

VIEW PAYMENT HISTORY

Document Approval Limits

Department Approvals

<=$1000   Fiscal Officer

                                 Department (Doc. Types: AV, BA, DI, GEC, Encumbrance, TF)

$100.01-$9999.99   Fiscal Officer

                                 Department (organizations-ORG)

                                 (Doc. Type: DV, IB, IO, REQ, WOA)

>=$10,000   Fiscal Officer

                                 Department (organizations-ORG)

Action	Requested Of
PENDING APPROVE	ORG-8045
PENDING APPROVE	DIV-V4

Dean/VP

Your PR may require additional approvals (i.e., Separation of Duties, Animal Purchase Review, Property, etc.) before it routes to Procurement.

Colorado State University

For assistance:

Lynette Brink

491-5105

Procurement_Help_Desk@colostate.edu