UCI Procurement Services

Requisition

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How to: Enter a KFS Requisition

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.

Note: The icon represents a searchable field. For detailed instructions and tips go to the How To: Perform a Search in KFS chapter.

Step 3: Document Overview Tab

A. Enter information in the **Description** field (40 characters maximum).
    a. Write a description that makes sense to others who will view the document.

b. 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.

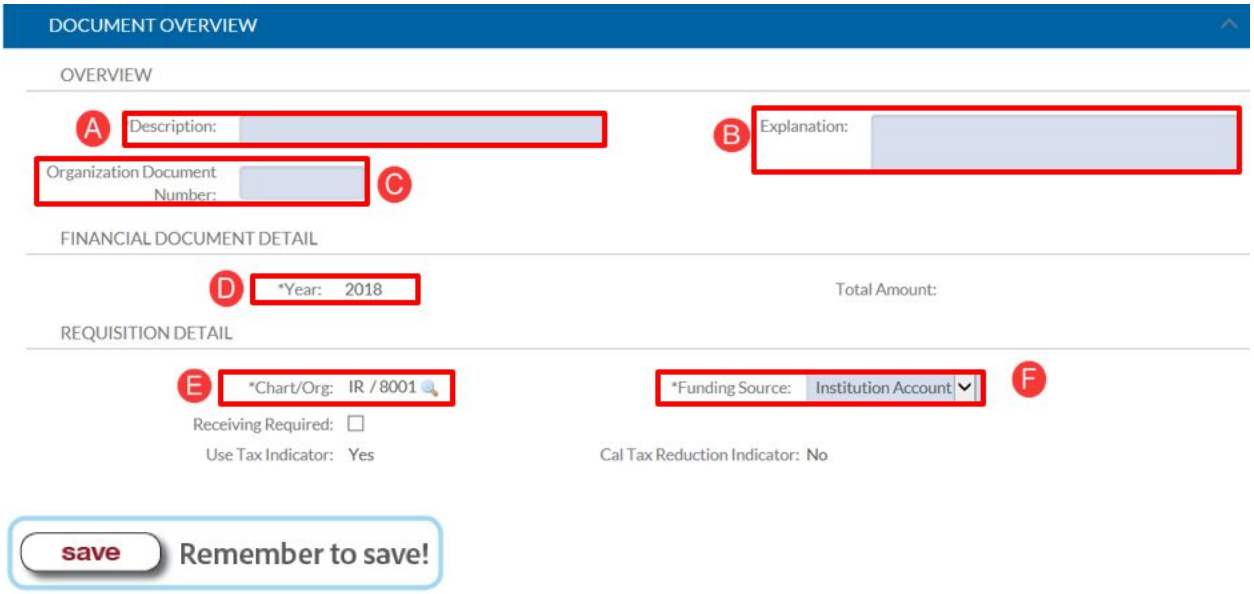
C. The **Organization Document Number** is an *optional* 10 character identifier which appears in the General Ledger and searchable field when performing a **Custom Document Search**.

D. **Year** defaults to the current fiscal year.

E. **Chart/Org** defaults to the initiator's home Organization (department) code.

a. 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).



Note: Equipment for Research and Development - Enter the 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.

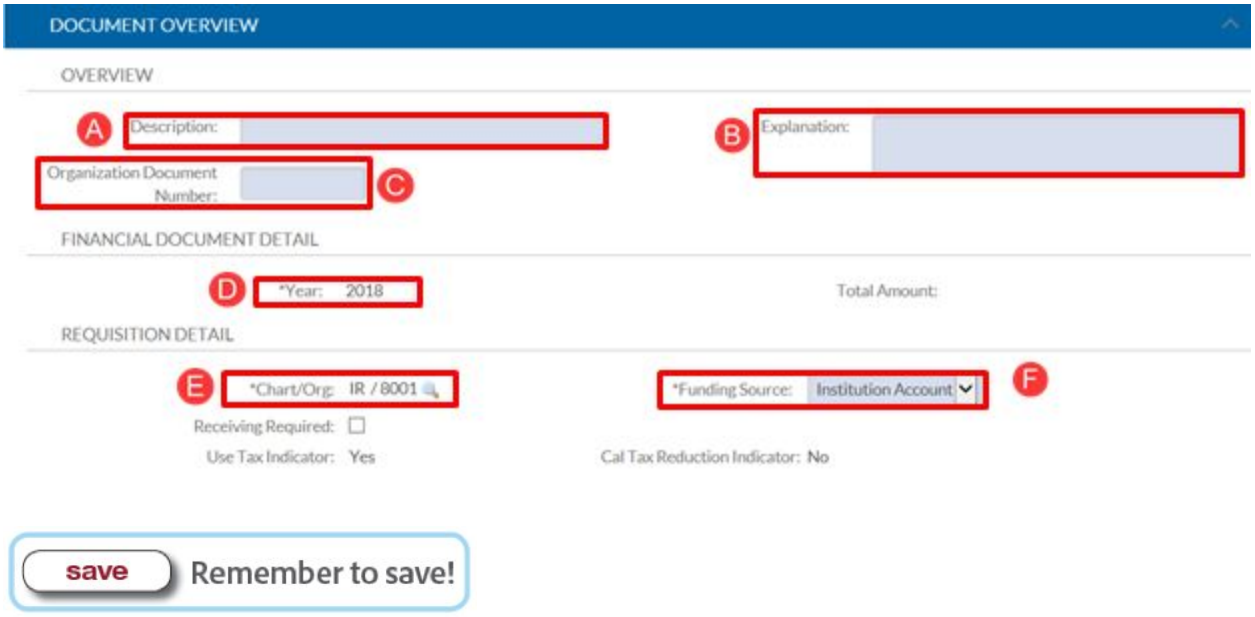
Trade-in: Note trade-in information in this field. Provide trade-in property ID tag numbers and the amount. Also note this in the **Description** field of the line item that the trade-in applies to.

Step 4: Delivery Tab

A. **Delivery Campus** defaults to the initiator's home campus.

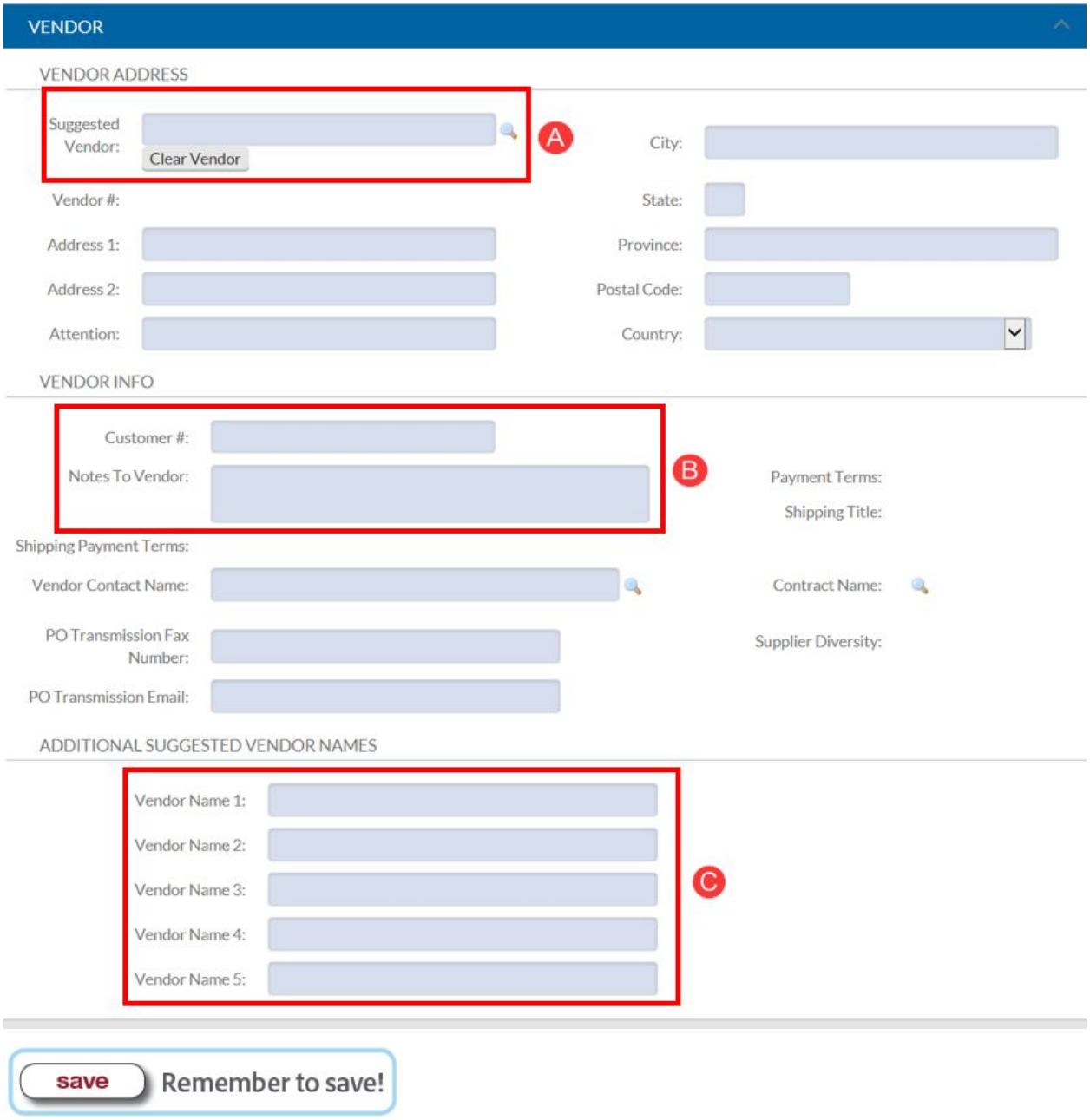
- Use the button to change the campus delivery location.
- IR (UC Irvine), MC (Medical Center) or SW (Systemwide)

B. Use the button in the **Building** field to search for the desired building or off-campus address to populate the field properly.
    - Optional: Select the **Set as Default Building** if you would like the address to automatically populate on future orders. This can be changed or edited.
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.*



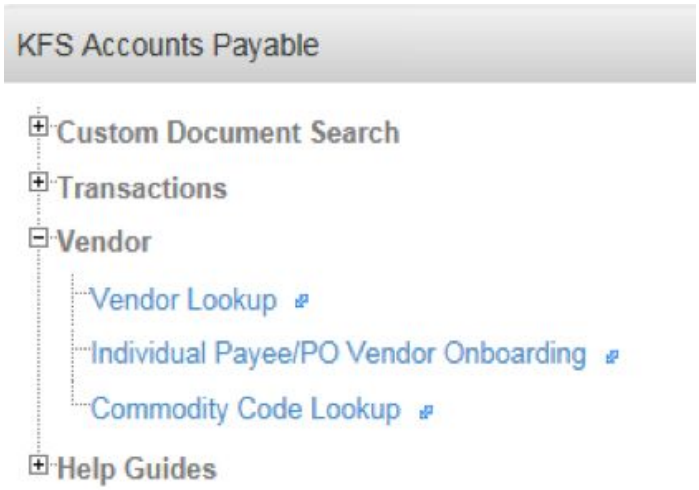
Step 5: Vendor Tab

A. The **Suggested Vendor** field communicates vendor preference to the Contract Manager
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.

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 the catalog number if applicable.

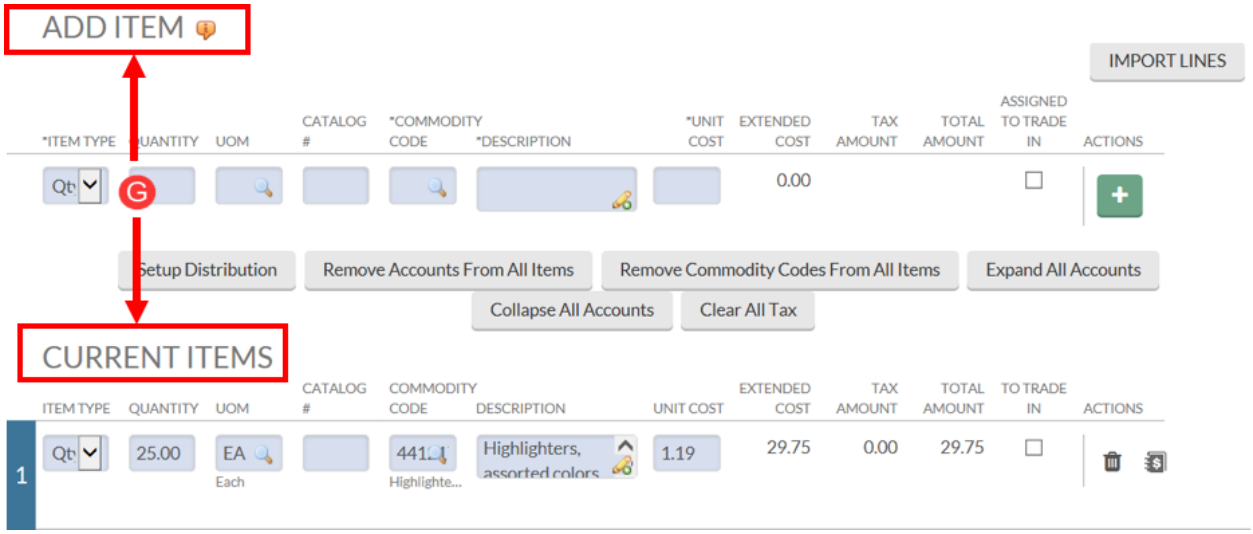
D. In the **Commodity Code** field, use the button to find the appropriate code.

E. In the **Description** field, enter the item or service first, then descriptive features (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.

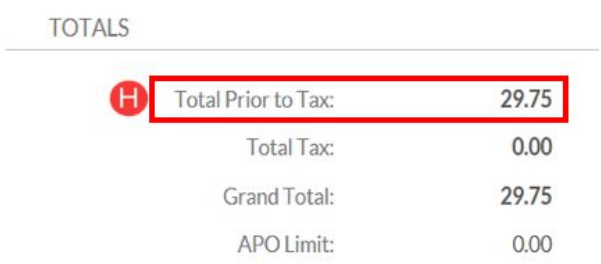
F. In the **Unit Cost** field, enter the estimated cost and select the button under the **Action** column to calculate the **Extended Cost**.

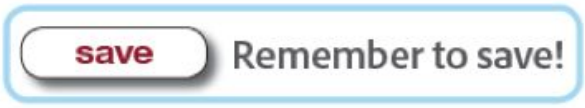
G. After the item(s) is added, it moves to the **Current Items** section. A new line appears above for additional entries.

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:

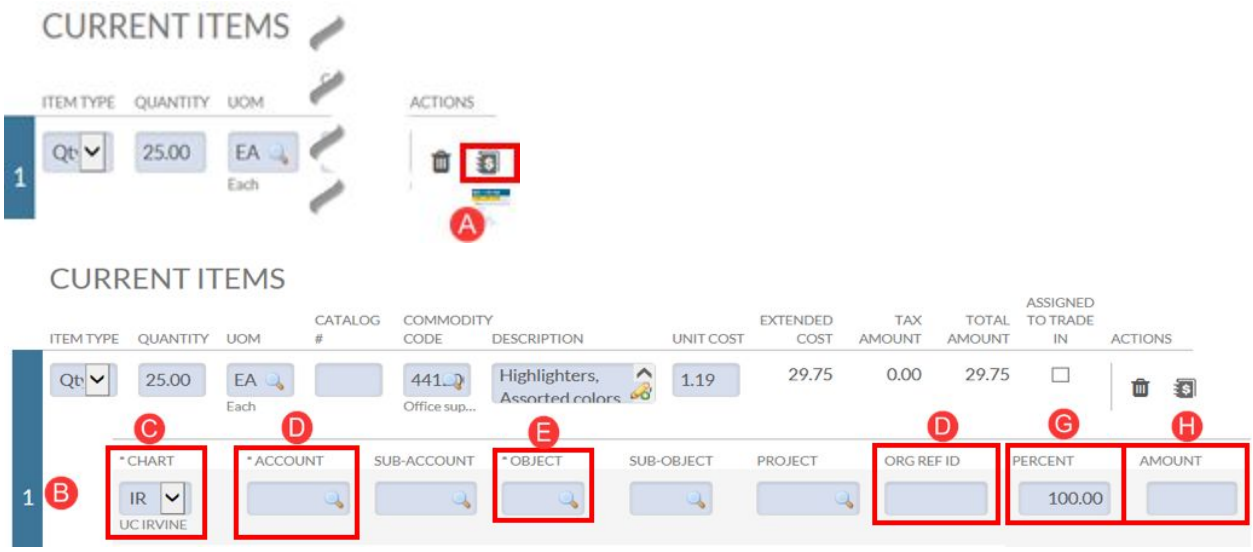
There are two different methods to add account information.

- **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

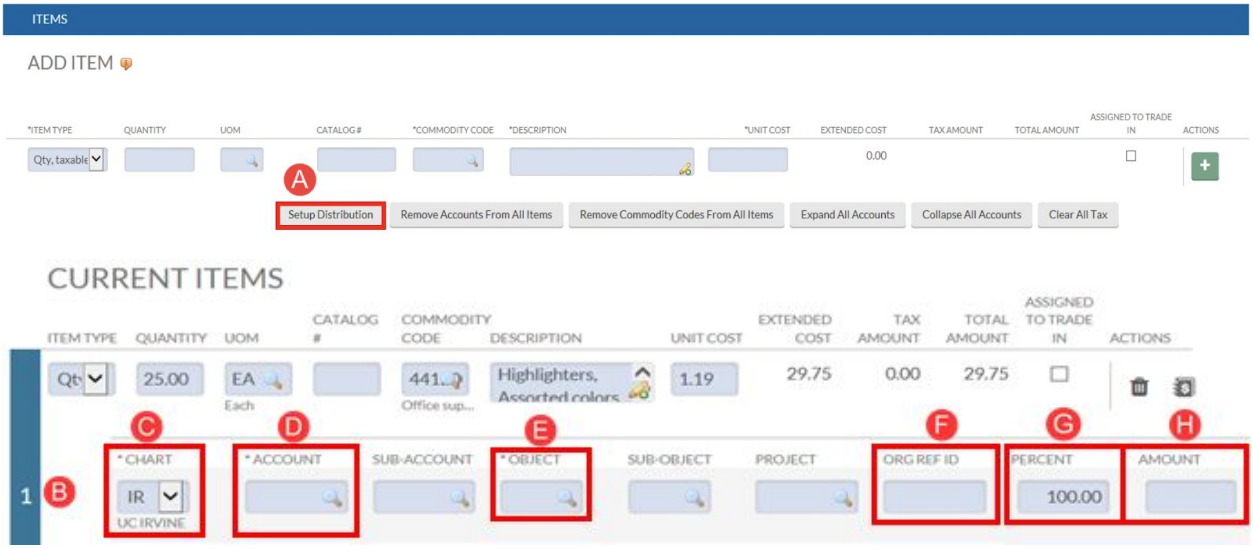
A. Select the **show** button below the item.
B. The **Accounting Lines** fields are directly below the item.
C. **Chart** defaults to the initiator's home campus (use the drop-down menu to change campus code).
D. In the **Account Number** field, use the button to find the appropriate account.
E. In the **Object** field, use the button to find the correct code.
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.
    a. 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.
    a. 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.

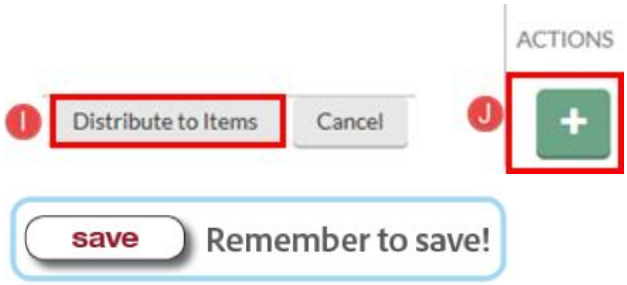


Steps for Method 2: Setup Distribution *(Distributes the same account/s to all items)*

A. After the last item is added, select the **setup distribution** button above the first item.
B. An **Accounting Line** sub tab opens, which displays the fields to enter the Accounting Line/s.
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.
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.
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.





Step 7: Capital Asset Tab

How to: Fill out the Items Tab When Purchasing a Capital Asset

A. Enter information under **Item Type, Quantity, UOM, Commodity Code, Description,** and **Unit Cost.** Select **add**. After the items are added to the Requisition, apply account information.
   - Shipping, special handling, or freight fees that apply for Capital Asset may be included as a separate line item (Qty, taxable or Qty, nontaxable). **Do not enter this information in the Additional Charges section otherwise the charges won't apply to the Capital Asset item.**
     - Use the same **Commodity Code** and **Object Code**
     - **Trade-in:** Notate in the **Explanation** field, and in the line item that the trade-in applies to. **DO NOT USE THE ADDITIONAL CHARGES SECTION**.

B. **Add Account Information** (use **show** or **setup distribution**).
   - The **Object** field requires different codes for Capital Asset which allows users to enter information in the **Capital Asset** tab. Below is a list of Object Codes to use for Capital Asset.

Level Code	Object Codes	Object Code Description
CPTL	9000	CAPITAL EQUIPMENT (NOT COMP&FURN) >=$5,000
CPTL	9071*	LEASE W/OPT TO PURCHASE(INSTALMT)>=$5000
CPTL	9230	SOFTWARE TO BE CAPITALIZED > $5M (asset type Z3332)--(not software license fee)
CPTL	9235	SOFTWARE TO BE CAPITALIZED >=$5000&<$5M (asset type Z3331)--(not software license fee)
00P3	9303	EQUIPMENT INVENTORIAL PLANT ONLY >= $5000
CPTL	9310	TRADE IN ALLOWANCE OLD EQUIPMENT
FABR	9610	FABRICATION EQUIPMENT AND COMPONENTS

CPTL	9700	BLDGS & STRUCTURES TO BE CAPITALIZED
CTPL	9900	COMPUTER EQUIPMENT >= $5,000
CPTL	9950	OFFICE FURNITURE >= $5,000

*Object Code 9071—Does not allow users to enter information in the Capital Asset tab; however, Requisition documents will route to the Equipment Reviewer to collect Capital Asset data before approval. Please include the following information in an attachment in the **Notes and Attachment** field:

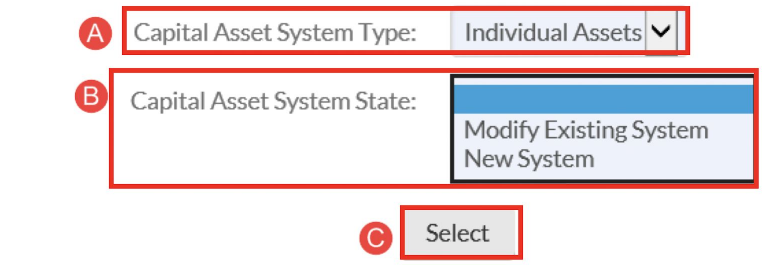
- Capital Asset Transaction Type
- Manufacturer
- Asset Type
- Model Number
- Item Quantity
- Campus Location
- Building Information (where will the asset reside? Include room number)

How to fill out the Capital Asset Tab – Equipment over $5,000

This tab identifies high-value assets or modify (adding value) to the existing regular non-fabrication asset or fabrication asset that must be accounted for as capital investments.

Note: The Capital Asset tab does not allow users to enter information in the tab if an incorrect object code is used.

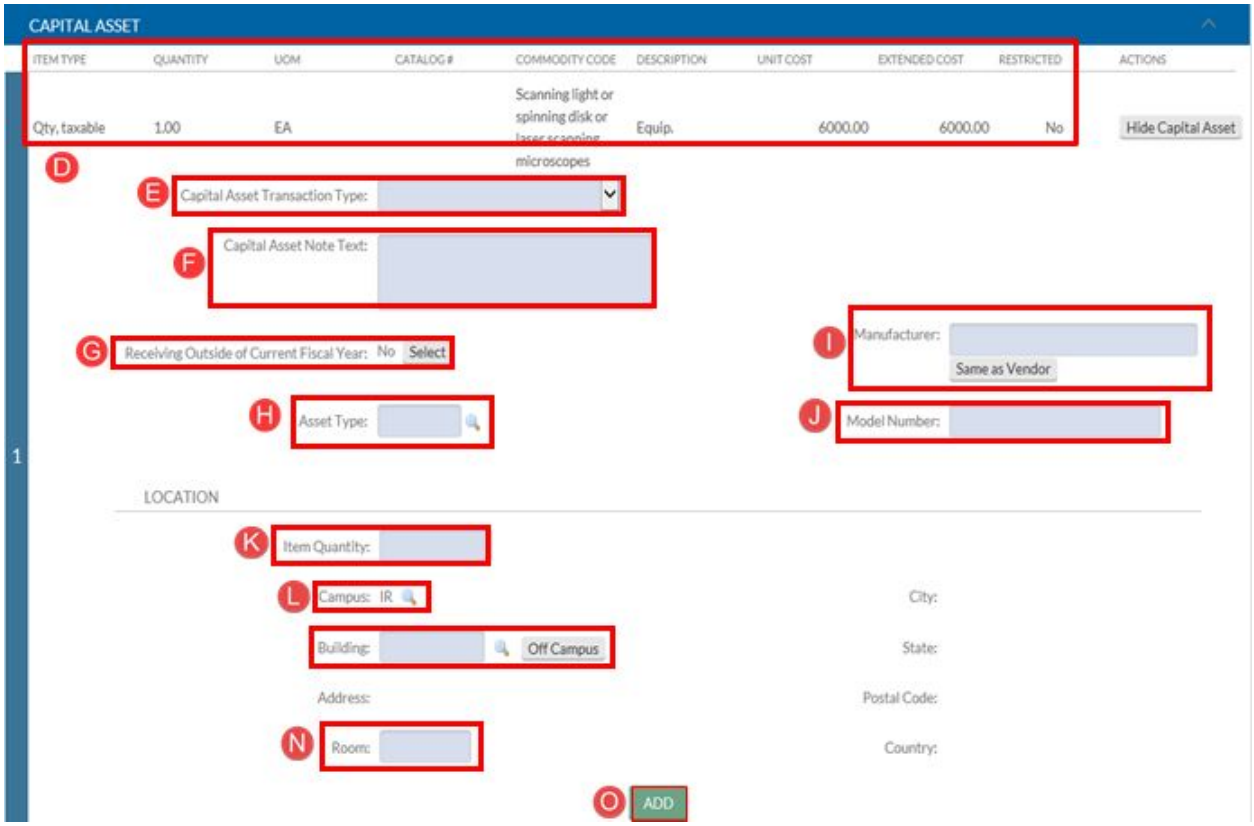
A. In the **Capital Asset System Type** field, use the drop-down arrow and select **Individual Assets** (only option).
B. In the **Capital Asset System State** field, use the drop-down arrow to select your choice. The options include:
    - New System—new piece of equipment.
    - Modify Existing—adding parts, equipment to existing piece(s) of equipment or a new fabrication.
C. In the **Action** field, use the **select** button to expand the **Capital Asset Items** sub tab. This tab is mandatory to complete as it defines asset transaction type.



D. **Item Line** displays the information from the **Items** tab.
E. There are five *options* to select from in the **Capital Asset Transaction Type** drop-down menu:
    - New
    - Modify Existing
    - Fabrication
    - Cost of Installation
    - Cost of Assembling the Asset
F. In the **Capital Asset Note Text** field, enter text to describe how the items will be used (together or separately). For example, Smith lab will use the telescope and lens as one asset and the microscope as a separate asset. *The Central Equipment Reviewer adds the property tag number.*
G. For **Receiving Outside of Current Fiscal Year**, the field defaults to **No**. Press **select** to change the field to **Yes**.
H. Select the **Asset Type** by selecting the lookup button.
I. Type in the manufacturer in the **Manufacturer** field. Selecting the **same as vendor** button populates the field with the vendor name from the **Vendor** tab.
J. Enter in the **Model Number** of the asset in the field.
K. The **Location** sub tab needs to be completed by the user. In the **Item Quantity** field, enter the quantity of the items stored in the building location.
    - For multiple quantities, specify if the location is the same or different.
L. **Delivery Campus** defaults to the information from the accounting lines.
    - Use the button to change the campus delivery location.
    - IR (UC Irvine), MC (Medical Center) or SW (Systemwide).
M. Use the button in the **Building** field to search for the building (use the **Building Street Address** search field).
    - The **off campus** button populates editable fields; however, it is unlikely that this field will be used.
N. In the **Room** field, enter the room number (minimum of four digits, e.g. 0004 or 0300).
    - Enter “NOROOM” for buildings without room numbers.
    - If the selected building contains room numbers, the button appears to assist in locating a room number.

O. Select the **add** button. This creates a new line on top for additional entries. Complete steps A – O for any remaining line item quantity.

Complete same steps for additional line items. If the additional line items are for accessories that a particular line item, users can note that in the **Manufacturer and **Model Number** fields to avoid typing the same information over again.



Non-Fabrication Equipment Requisition (Modify Existing/Adding Value):

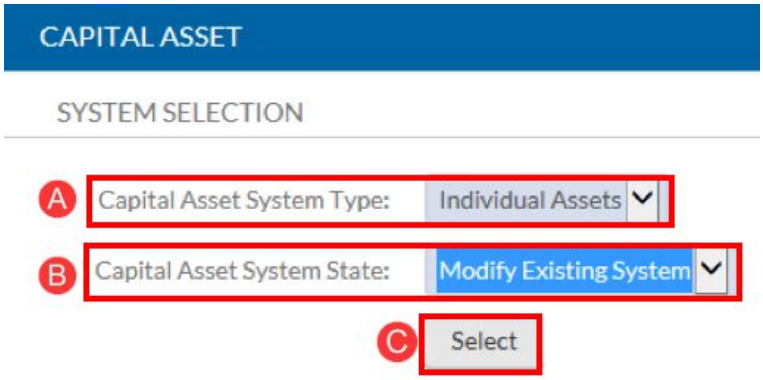
This process is used for adding value (≥5k/non-consumable, useful life of 1+ years; cannot be a repair) or modifying existing non-fabrication property.

Here are some helpful hints for each tab:

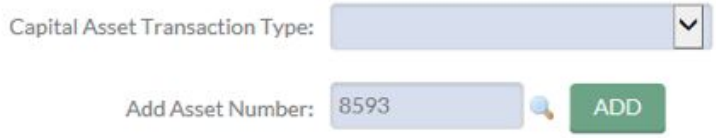
- **Document Overview:** Type: Add value to non-fab asset # (enter in the 9 digit property ID tag number).
- **Delivery:** Ensure delivery tab is complete—don't forget to input the organization name in the **address 2** field.
- **Vendor:** Complete this tab too.
- **Items:** Two **Object Codes** for this scenario are **9000** or **9900**.

Complete **Capital Asset Tab**

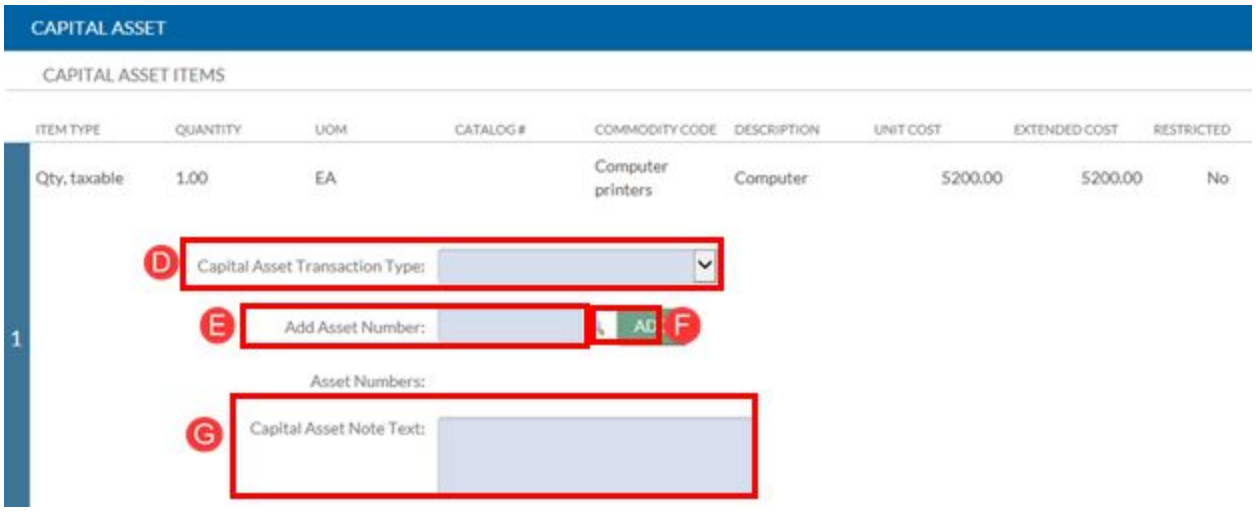
A. In the **Capital Asset System Type** field, use the drop-down arrow and select **Individual Assets** (only option).
B. In the **Capital Asset System State** field, use the drop-down arrow to select **Modify Existing System.**
C. In the **Action** field, use the **select** button to expand the **Capital Asset Items** sub tab for the **Item Line**.



D. Select **Modify Existing** from the **Capital Asset Transaction Type** drop-down menu.
E. Select the **Asset Type** by selecting the lookup button.
F. Select **add.** This populates a blank field above the **Asset Numbers** field. Users can add additional asset numbers or select **delete** if the wrong asset number was selected.



G. In the **Capital Asset Note Text** field, copy text from the **description** text from the **Document Overview** tab.



Fabrication Equipment Requisition (Modify):

This process is used to modify an existing fabrication asset.

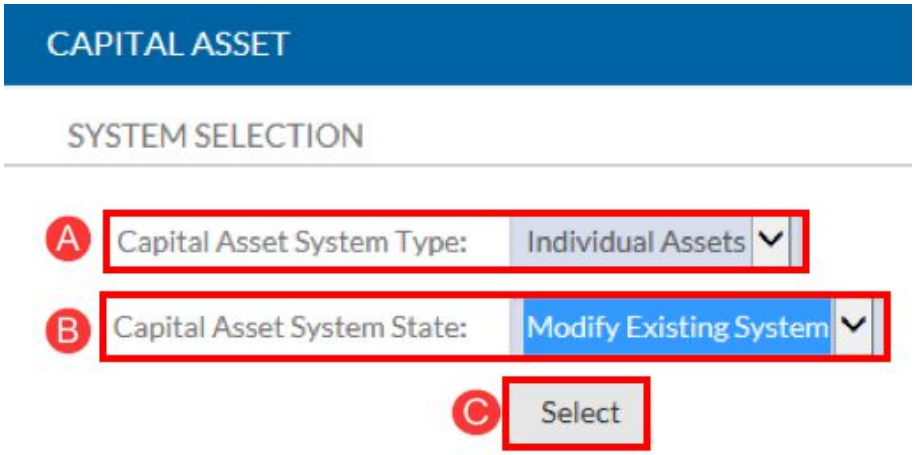
Complete the **Document Overview, Delivery, Vendor,** and **Item** tabs

Here are some helpful hints for each tab:

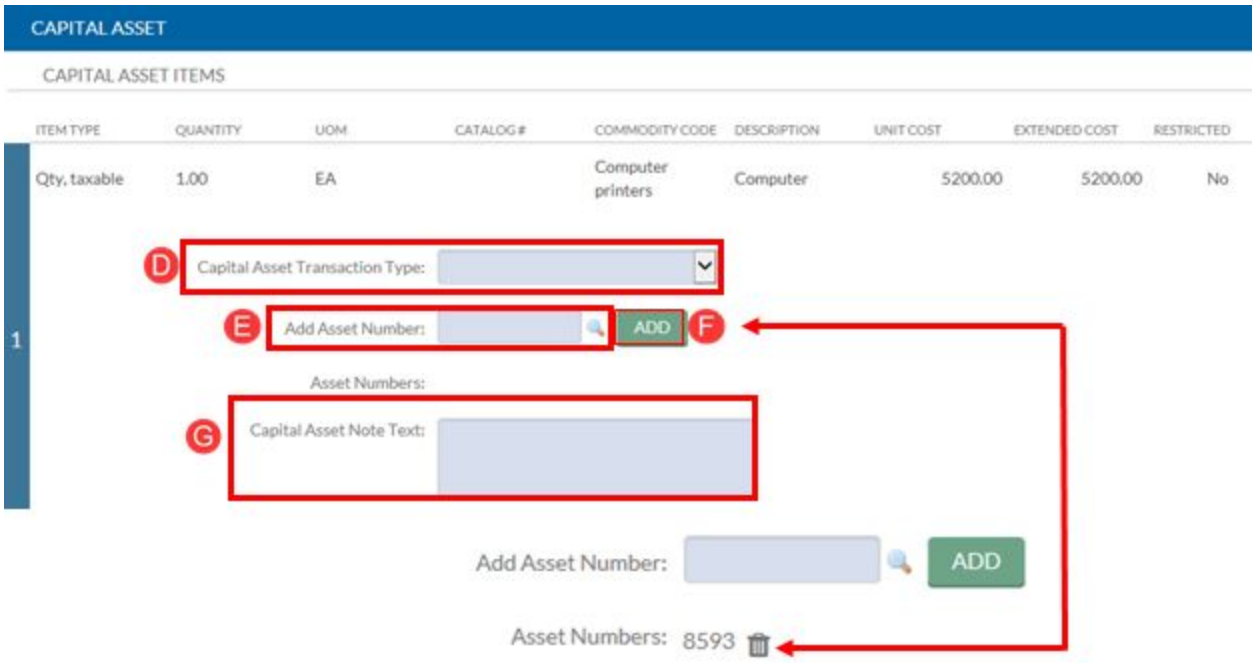
- **Document Overview:** *Type: Add value to fab #* (enter in the 9 digit number).
- **Delivery:** Ensure delivery tab is complete—don't forget to input the organization name in the **address 2**field.
- **Vendor:** Complete this tab too.
- **Items:** Use object code **9610** for this scenario.
- **Notes and Attachments:** Upload UG prior approval if the fund number does not appear for the asset. See **Add Asset Number** lookup instructions for more information.

Complete Capital Asset Tab:

A. In the **Capital Asset System Type** field, use the drop-down arrow and select **Individual Assets** (only option).
B. In the **Capital Asset System State** field, use the drop-down arrow to select **Modify Existing.**
C. In the **Action** field, use the **select** button to expand the **Capital Asset Items** sub tab for the **Item Line**.

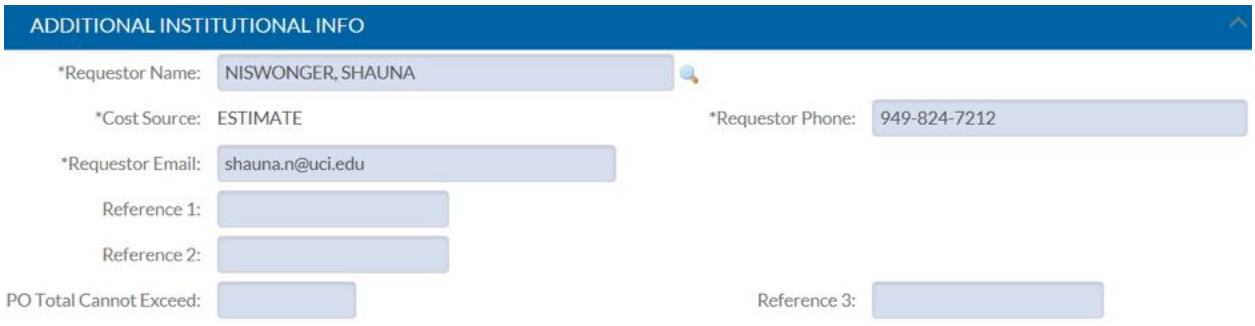


D. Select **Fabrication** from the **Capital Asset Transaction Type** drop-down menu.
E. Lookup the **Add Asset Number**.
F. Select **add.** This populates a blank field above the **Asset Numbers** field. Users can add additional asset numbers or select **delete** if the wrong asset number was selected.
G. In the **Capital Asset Note Text** field, copy text from the **description** text from the **Document Overview** tab.



Step 8: Additional Institutional Info Tab

- 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.



Campus Temporary Employees—occasionally the **Requestor Phone** field doesn't populate. Please enter a phone number to avoid an error message when submitting the KFS Requisition.

Step 9: 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.

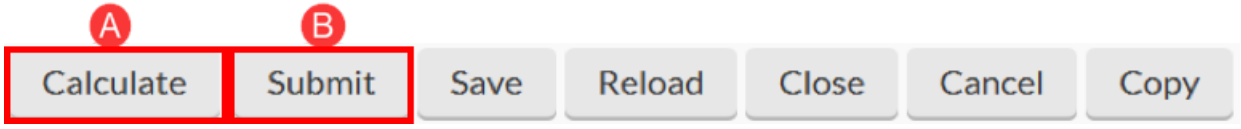
B. In the **Attached File** field, select the Browse... button to upload an attachment (PDF / less than 5 MB).
   - Examples of attached files include quotes, sole source justifications, emails, etc.
   - Never attach documents that contain sensitive information, ex. social security numbers, home addresses, 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.
   - **Note: Accounts Payable will not be notified by KFS when invoices are uploaded as backup documentation. Send a copy to accounts-payable@uci.edu, referencing the PO number, to be processed.**

C. Select the ADD button to complete the file upload.

Step 10: Calculate and Submit the Requisition

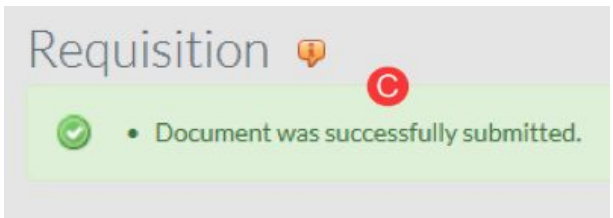
A. After all the information is entered, scroll to the end of the Requisition and select **calculate.** After **calculate** is selected, scroll back to the **Items** tab and check to make sure that tax calculated for the item. *Troubleshooting tips if tax doesn't populate:*
   - Check to make sure the 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**.



Important Reminder: If the Cancel button is selected at any time, the Requisition becomes inactive which means the user must start the process over again!

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.

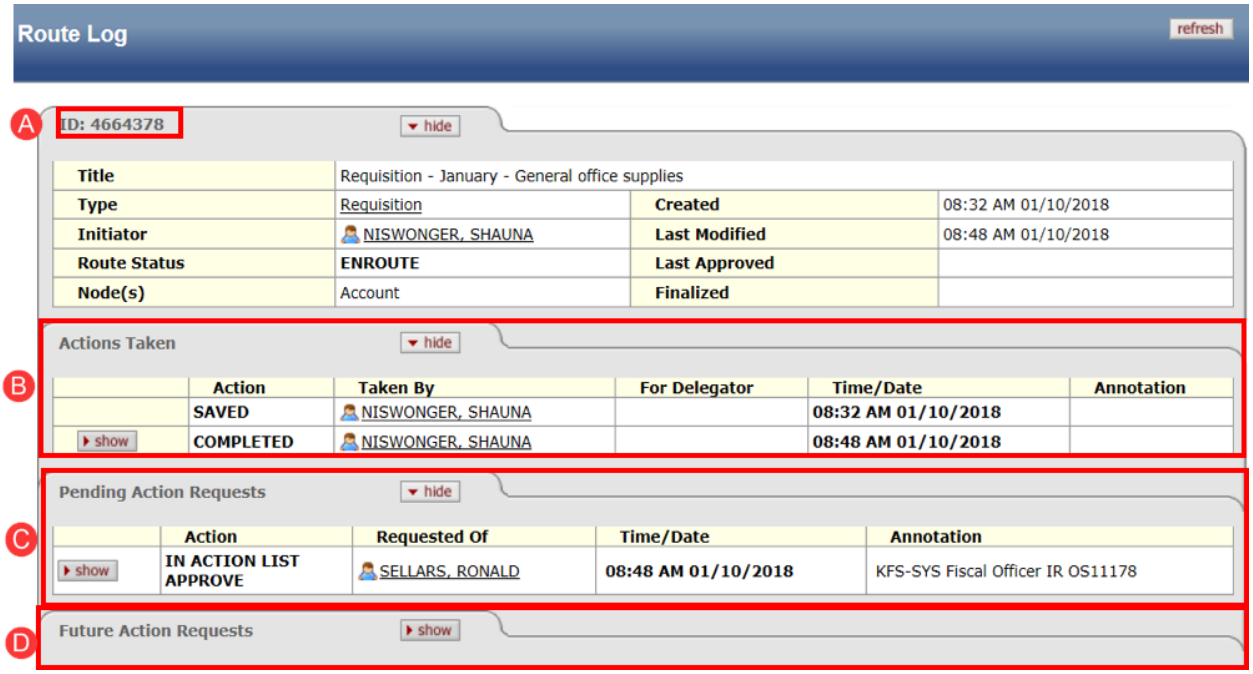


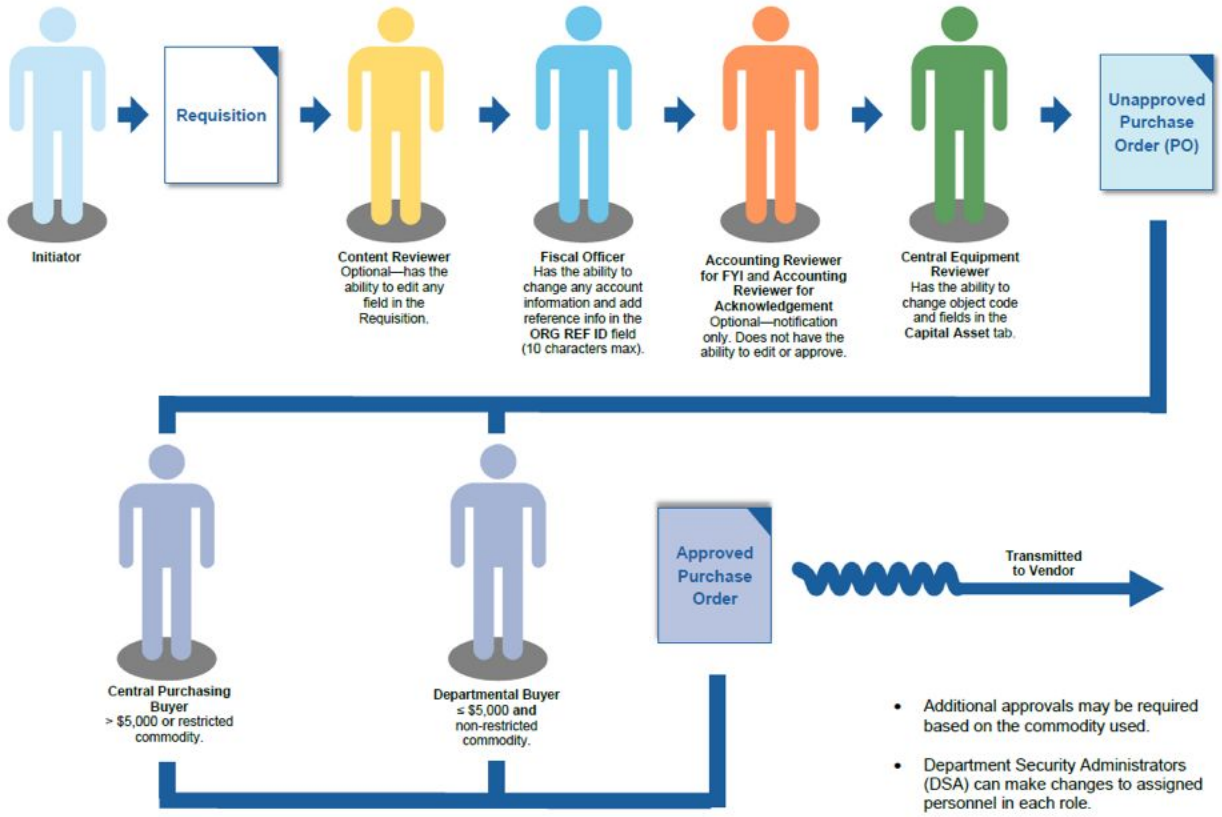
Step 11: Reload

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 12: 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.




Initiator
Requisition
Content Reviewer
Optional—has the ability to edit any field in the Requisition.
Fiscal Officer
Has the ability to change any account information and add reference info in the ORG REF ID field (10 characters max).
Accounting Reviewer for FYI and Accounting Reviewer for Acknowledgement
Optional—notification only. Does not have the ability to edit or approve.
Central Equipment Reviewer
Has the ability to change object code and fields in the Capital Asset tab.
Unapproved Purchase Order (PO)
Central Purchasing Buyer
> $5,000 or restricted commodity.
Departmental Buyer
≤ $5,000 and non-restricted commodity.
Approved Purchase Order
Transmitted to Vendor
• Additional approvals may be required based on the commodity used.
• Department Security Administrators (DSA) can make changes to assigned personnel in each role.

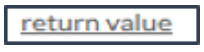
How to: Perform a Search in KFS

The lookup feature is a search tool used to identify data that populates the following fields of a requisition:

- Building Name
- Vendor Name
- Commodity Code
- Account Number
- Object Code

Helpful Hints: Asterisks (*) are used to fine-tune search results. The list illustrates different combinations of text and asterisk (*) placement to help users find data to complete the requisition. Biological Sciences is used as an example:

Search Example	Search Results: ***The first three search examples are used most frequently.***
bio	Results include the letters “bio” within the name
bio*	Results **begin** with the letters “bio”
***bio**	Results **end** with the letters “bio”
bio*sci	Results include the letters “bio” **and** “sci” within the name, **in that order** (*refined results*)
bio*|*sci	Results include anything with “bio” **or** “sci” (pipe key search—above ‘enter’ key); Shift +
bio*&&*sci	Results include the letters “bio” **and** “sci” within the name, **in any order** (*refined results)*
bio	Results are an **exact** match. No results produced unless there is an exact match.

- After information for the search is entered, select the search button to return results. Identify the correct data and select 

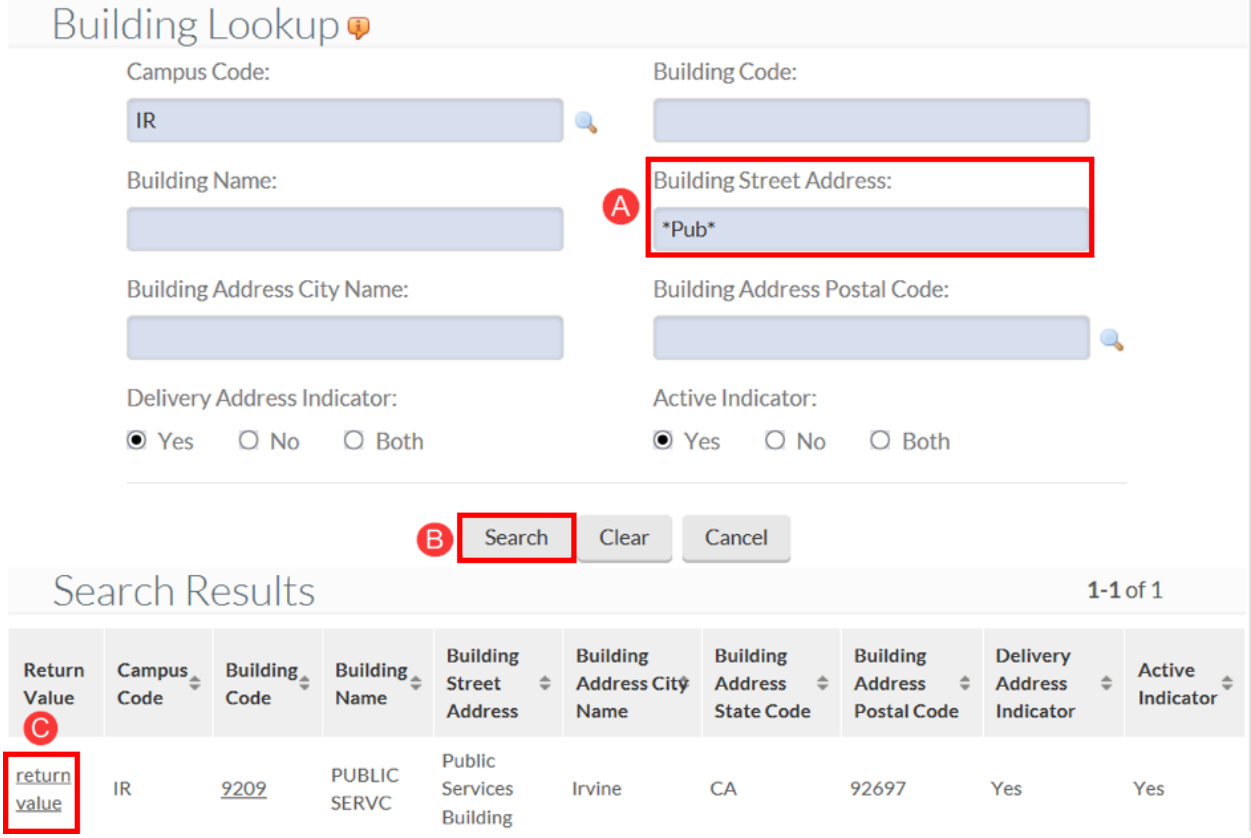
to populate the requisition.
- Selecting the **cancel** button takes users back to the requisition screen without adding or changing information.
- If users don’t find the data they are looking for, search criteria should be revised, ex. fix spelling errors, add asterisk(s), use partial search words, etc.
- If users cannot find the desired result after *repeated* searches, contact Procurement Services for assistance: procurement@uci.edu or (949) 824-4040.

Note: all data from the search (lookup) page can be exported to CSV, Excel or XML which can be helpful to create cheat sheets for future use.

Building Lookup

Used to fill out the Delivery tab on the Requisition that populates the delivery address (main campus, Medical Center & off campus pre-loaded addresses).

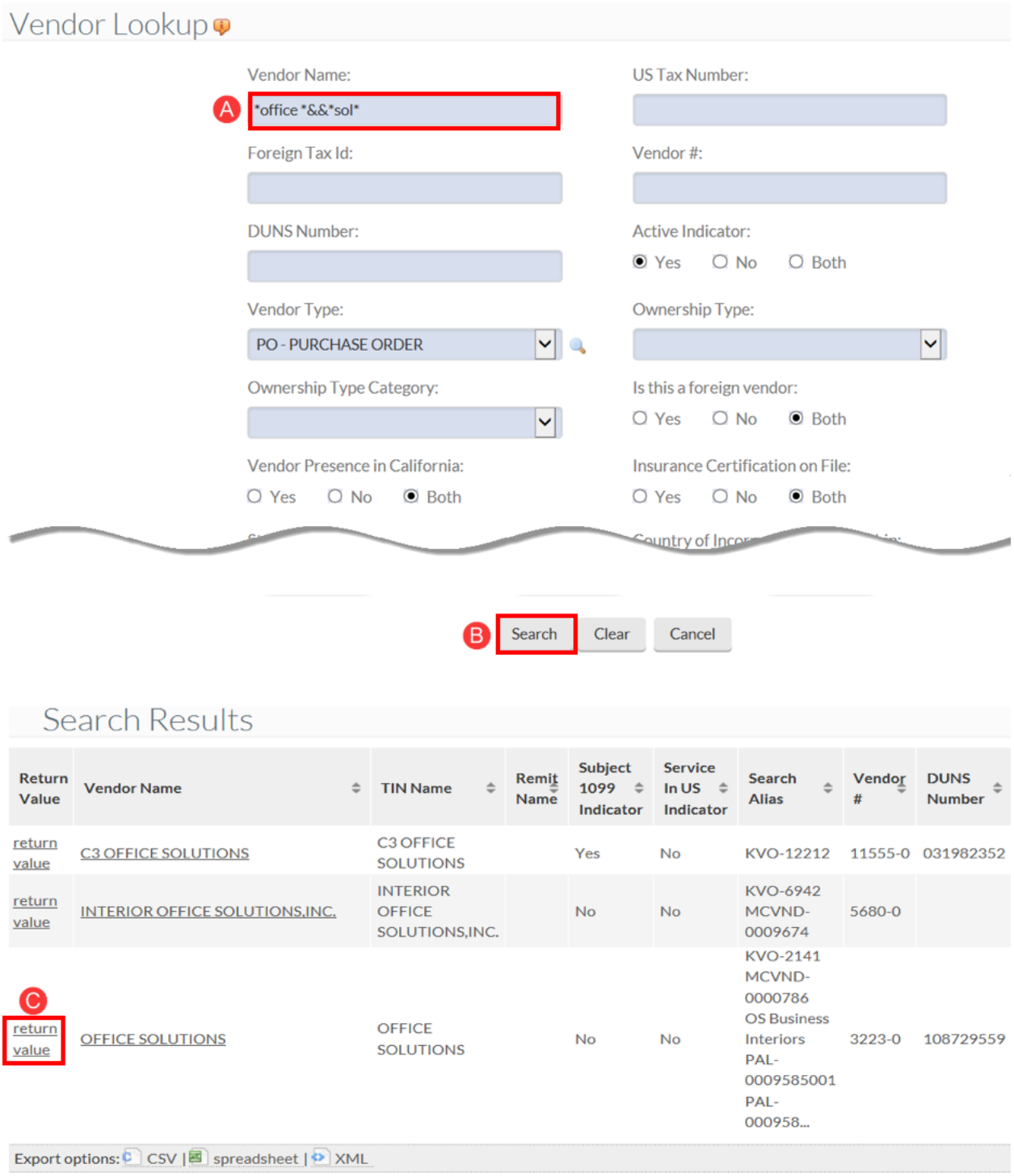
A. Enter search criteria in the **Building Street Address** field.
    a. Enter a portion of the building name, or street. Ex: *Public* for Public Services.
B. Select **search.**
C. Select **return value**.



Vendor Lookup

Used to fill out the Vendor tab on the Requisition to populate the desired or suggested vendor information to a department or central Contract Manager (buyer).

A. Enter a partial name of the vendor in the **Vendor Name** field. For example, “office* for Office Solutions.
B. Select **search**.
C. Select **return value**.



***Not applicable for Requisitions created through UCIBuy.**

Commodity Code Lookup*

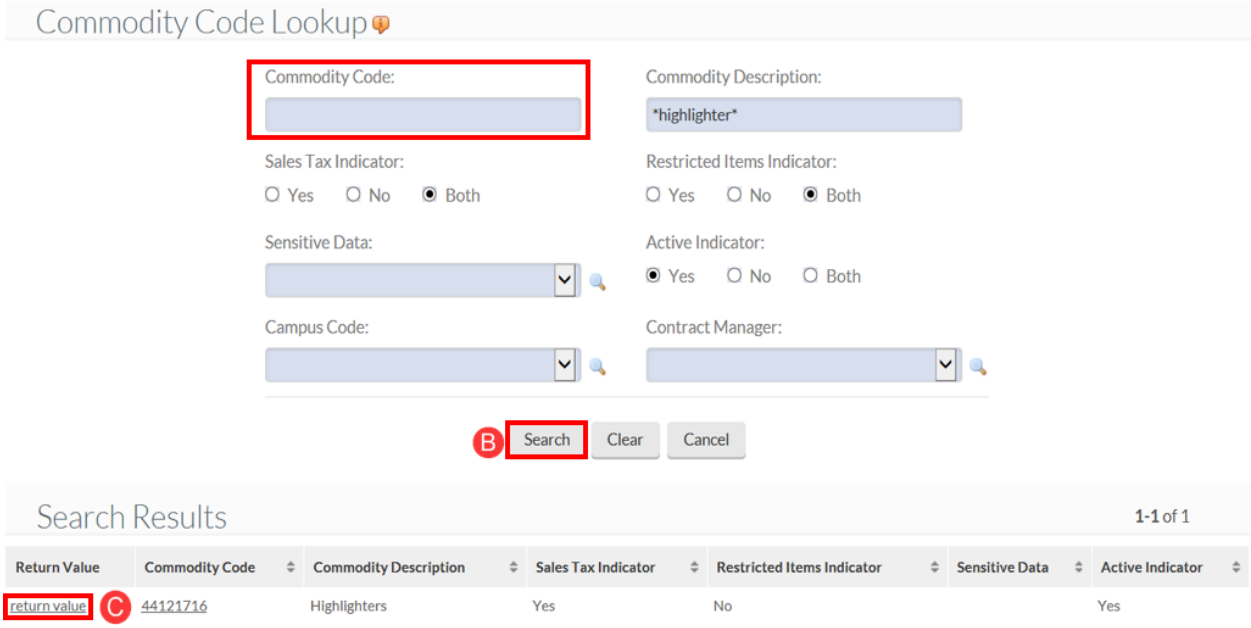
The Commodity Code defines and describes item(s) being purchased as well as ensuring the Purchase Order (PO) is routed to the correct Contract Manager (buyer).

Note: *With the implementation of KFS, UCI is adopting the use of the United Nations Standard Products and Services Code (UNSPSC) to classify goods and services as commodity codes in KFS.*

A. Enter search criteria in the **Commodity Description** field. For example, *highlighter*
B. Select **search**.
C. Select **return value**.

Search Hints

- Never use a brand name (ex. Kleenex, instead use *facial*|*tissue*).
- Always start with a narrowed search for the product or service.
- Expand your search only if you don't get the results you were looking for the first time.
- Always use asterisks (*) if an exact match for the description is unknown.



Account Lookup

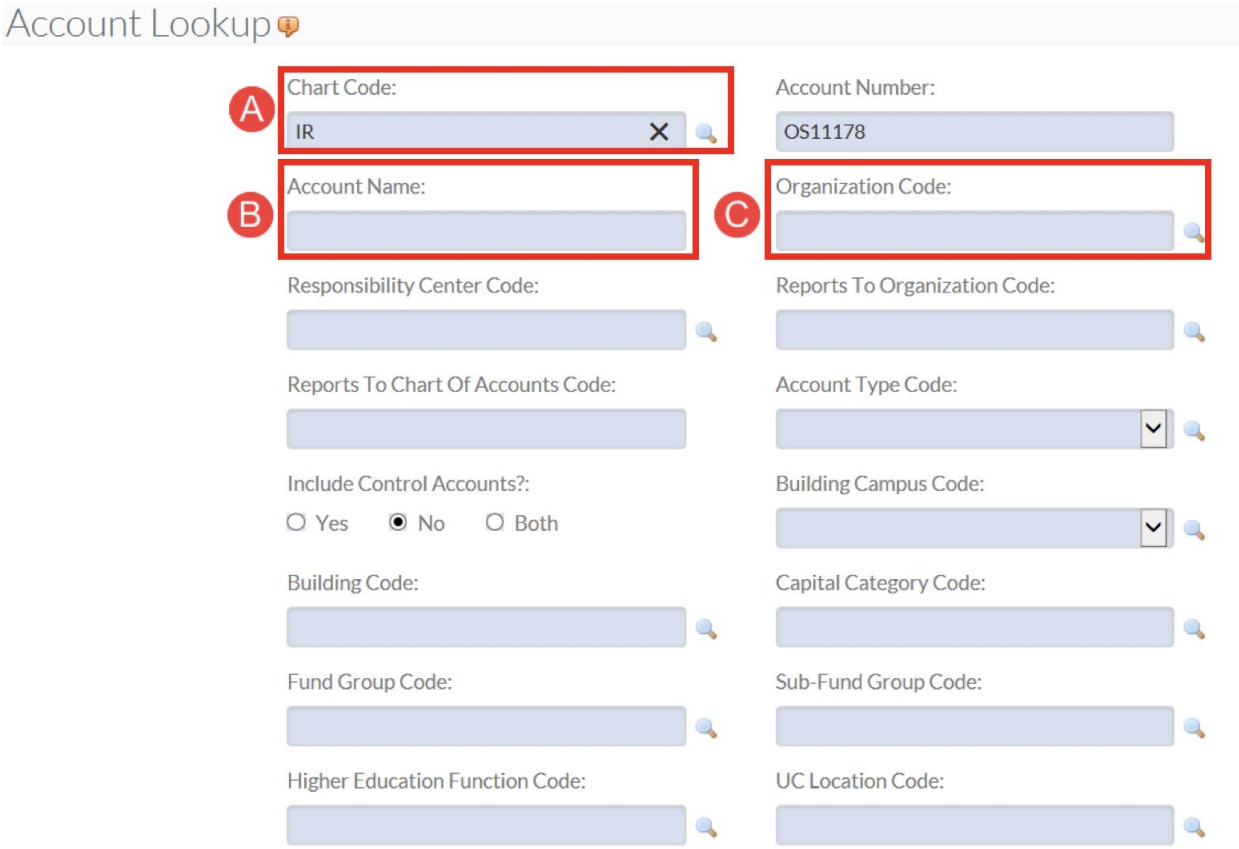
The Account Lookup is a tool used across multiple document types to help users find a KFS Account.

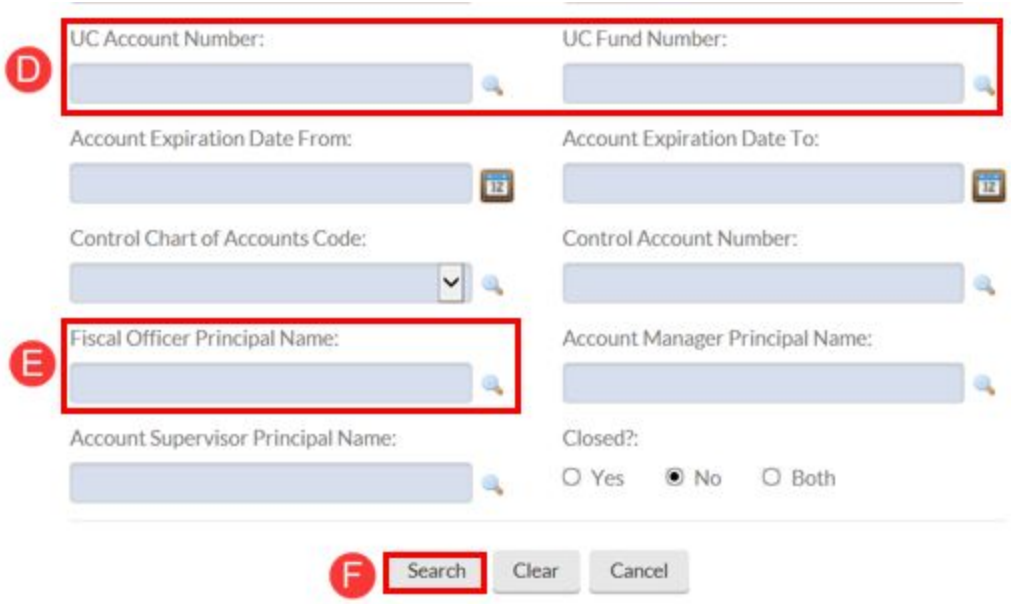
A. Verify that the **Chart Code** (defaults to what the initiator selected in the Accounting Line section).
    a. IR (UC Irvine), MC (Medical Center), or SW (Systemwide)
B. Enter a portion of the name in the **Account Name** field. For example, *proc* for Procurement.

Steps C—E show alternate options to use to search for the account number.

C. **Organization Code** is a 4 digit code given to each unit/ department/organization in KFS.

D. **UC Account and UC Fund number**—the new KFS account number can be identified by entering the old legacy number.
E. **Fiscal Officer Principal Name** is the UCInetID of the Fiscal Officer responsible for a KFS account.
F. Select **search**.




D
UC Account Number:
UC Fund Number:
Account Expiration Date From:
Account Expiration Date To:
Control Chart of Accounts Code:
Control Account Number:
E
Fiscal Officer Principal Name:
Account Manager Principal Name:
Account Supervisor Principal Name:
Closed?:
Yes
No
Both
F
Search
Clear
Cancel

How to: Set up a Recurring Payment Requisition

Recurring Payment Guidelines

- Weekly, monthly, quarterly services (e.g. elevator maintenance, professional services) generally qualify
- Non-Service Items
    - Dollar value per transaction, and overall dollar value (minimum $1,000/year)
    - Volume of transactions (minimum 12/year)
        - Low Transactions/High Dollar (not an ideal candidate)
        - High Transactions/Low Dollar (ideal candidate)
- Recurring Payments cannot be created for UCIBuy suppliers

Multi-Year Contracts

- Recommend to enter in KFS one year at a time and detail the extended years in the description field to satisfy vendor terms. > KFS Purchasing Training Guides
    - If funds are encumbered for one year at a time, a Purchase Order Amend needs to be completed within 90 days before the close of the Fiscal Year.

Document Overview Tab

- **Description:** Begin the description with RP (Recurring Payment).
    - **Explanation:** Include detailed notes for this field, including the previous purchase order number, if applicable. This helps the Contract Manager communicate appropriate information to the supplier.

Delivery and Vendor Tab

- Ensure the start date is entered in the **Date Required** field.
- No additional changes from Requisition Fundamentals instructions.

Items Tab

- **Item Type:** Use **No Oty, taxable** for Recurring Payments. This is for all cases. The Purchase Order will lien tax and AP will review the invoice and determine if any tax is applicable. For example, if parts were included.
    - **Quantity** and **UOM** fields are left blank.
- **Description:** The most important field in processing a Recurring Payment. Include the following 5 bullets in the**Description** field on a separate line (shown below):
    1. **Description of Product(s) or Service(s):** provide as much detail as possible.
    2. **Identify owner of Recurring Payment PO (RPPO)**, e.g. department, lab, group – “For Smith Lab in Biological Sciences”

3. **Authorized persons (Authorized Users)** allowed to purchase, i.e. Jane Smith, Mary Jones, etc.
4. **Period of performance** – "Period of performance 7/1/15 - 6/30/16"
5. **Total cost not to exceed.** If "taxable" is selected, tax is added to the dollar amount entered in the line item. Adjust the **Unit Cost** and max dollar amount accordingly.
    - ➢ **Example 1**: Total cost not to exceed 12 monthly payments of $3,000, for a total of $36,000. If tax is to be included, change the dollar amount to reflect tax, (i.e. change $36,000 to $38,880).
    - ➢ **Example 2**: Copier maintenance as needed, total cost not to exceed $3,000. *Users need to consult with the supplier to obtain a standard price list for commonly purchased goods and services, e.g. service call $100; cleanup & lubrication $25; drum replacement $200 (same tax logic from above applies).*

Note: 254 characters transfer to the vendor; Contract Managers need to complete the Stipulations tab for Recurring Payments that exceed 254 characters.

- **Unit Cost:** Enter the total dollar amount, select **add** under the **Actions** column.
    - To back out tax, divide the total by 1.08 (represents 8% tax). For example, if the total cost is not to exceed $36,000, enter $33,333.33 in the **Unit Cost** field. *KFS system rounds two decimal points which can impact final amount. In that case it's better to be over than under.*

Payment Info

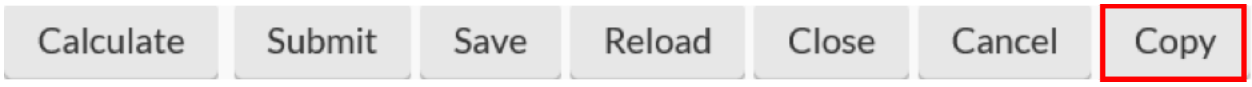
- Check the box next to **Recurring Payment** and use the calendar icon to input a date range for the Requisition.
    - Calculate 90 days after the **end date** to allow payments to be made after the PO is closed.

Notes and Attachments Tab

- Many services include a supplier agreement or quotation, which may contain terms and conditions. Don't forget to attach.

Calculate and Submit the Requisition

How to: Copy a Requisition

Step 1: Copy the Requisition

A. Open the requisition document you would like to copy and select button at the bottom of the page.
    - Make sure to correct/validate all information in the document from the copied Requisition. The following items/tabs do not transfer over for copied Requisitions.
        - **Explanation** field from the **Document Overview** tab.
        - **Notes and Attachments**
        - **Ad Hoc**