KFS Purchasing Tip Sheet

Q. What does ‘save’ mean at the bottom of a Requisition (REQS)?

A. When you click ‘save’, the REQS will be saved in your Action List for you to complete at a later time. Unless you open your action list, select the document, complete it and then click calculate and submit, the requisition will stay in your action list and you will not receive your order.

Open your Action list:

Search for the document that says ‘SAVED, In Process’ with the action for you to ‘COMPLETE’ and click the number to open it.

Complete the REQS and then click ‘calculate’ then ‘submit’ to process.
Q. Where do I locate Contract Managers and the commodities they are responsible for?

A. You can find the listing on the Purchasing website under the ‘Buying’ topic: [Purchasing Contract Managers](#). You can look them up by name or by the Commodity. There is also an Excel spreadsheet on this page that is broken into a more detailed list.

Q. How can I send a note to purhelp (the purchasing help desk), from my REQS or PO?

A. Purhelp is considered a workgroup. Therefore, using the notification recipient field will not work. Complete the following steps.

1. Enter the Note Text on the Notes and Attachments tab and select add.

2. Open the Ad Hoc Recipients tab.

3. In the Ad Hoc Group Requests row, set the Action Requested to FYI, the Namespace Code to KFS-PURAP and the Name to PURHELP. Click ‘add’ and the message will be delivered to the purhelp action list. Please do not select Approve as this will hold up workflow.
Q. What if I want to send a note to an individual?

A. You would write the note and select ‘add’. Once you have added the note, the Notification Recipient field will display. Enter the user id of the intended recipient in the field and select ‘send’. The document will be sent to the recipients Action List with an action of FYI.

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Q. How do I set up a blanket order, also known as a Recurring Order, (an order that is regularly placed throughout a year)?

A. When setting up a blanket order, you need to be sure:

1) The Payment Info tab is completed – with a begin and end date for your order;
2) You encumber a reasonable estimate for the term of the blanket order;
3) If quantities are unknown, set the ‘Item Type’ in the Items folder to ‘No Qty’, leave Quantity and UOM blank;
4) If the blanket order is replacing a previous order be sure to reference the Previous PO in the description field in the ‘Items’ tab.
5) If you are copying a previous requisition, be sure you ‘refresh’ the vendor on the new requisition (by searching and returning the vendor) so the address/tax# are current (changes made in the vendor record do not automatically update on requisition documents).
Q. The default for Method of PO Transmission is Fax. When would I use ‘Print’?

A. Select ‘Print’ to make the PO available for printing by the initiator (for Automatic Purchase Orders) or by purchasing staff. For example: if you have an attachment that needs to be sent to the vendor with the PO; or if the vendor does not own a fax.

If I select Print, where do I find the PO to print it? A Print Notification will be sent to your Action List as an FYI. Clicking on the Notification will allow you to Print. However, if you miss the Notification, you may open the requisition and navigate to the View Related Documents folder. You will see the PO number.

Note that the PO says Unapproved. This is due to the ‘Pending Print’ status.

Click on the PO number and at the bottom of the PO you will see the ‘print’ button.
Q. When would I use ‘No Print’?

A. Select ‘No Print’ to keep the PO stored in KFS, without providing a copy to the vendor. If a vendor has a website that you ordered your product through; you would submit the PO number through that website after the PO is generated.

If, in the case of a renewal (subscription or software license for example), you would not print or fax the PO. Instead, you would send the renewal invoice to invoice@indiana.edu.

Q. How do I change a DV vendor to a PO vendor?

A PO vendor can be used on a DV, but a DV vendor cannot be used on a PO. To change the status from DV to PO, search for the vendor, select ‘edit’ and change the vendor type to PO. Remember to add a PO type address and select it as the default address.

Q. Where do I locate a PO number after I submit a REQS and it has been finalized?

A. After your Requisition (REQS) has been finalized and you want to find the Purchase Order number, there are two options.

1. Open a PO search document and enter the Requisition number. Click search at the bottom and you will see the PO. You can open it from there. This is the more direct way. OR

2. You can open a REQS search document and enter the REQS number. Open the requisition and scroll to the ‘View Related Documents’ tab and open the tab. Here you will see the PO number. Click the number and the PO will open.
Q. How do I check the status of a PO (or a REQS)?

A. Using the document search, enter the number and open the document. You can see the status on the top of the document. In this case, this is a requisition that has been finalized and there is a related PO. Go to the ‘view related documents tab’ and you will find the PO number there.

<table>
<thead>
<tr>
<th>Status:</th>
<th>FINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created:</td>
<td>08:32 AM 06/18/2014</td>
</tr>
<tr>
<td>Requisition Doc Status:</td>
<td>Closed</td>
</tr>
</tbody>
</table>

To retrieve more information on either the REQS or the PO, scroll to the “Route Log” tab. There you will see what status the document is in and where it is in workflow.

Q. If I have a hospitality event, do I need prior approval?

A. Yes! This link will take you to the procedures and contacts per campus!

Hospitality

Q. When do I use quantity and no quantity?

A. Quantity is anytime you have multiple UOMs you are ordering. No quantity is generally used if it’s a service; for example, a catering service, speaker, or performer.
The following details the status changes of documents

Q. Why does my requisition say closed?

A. If Closed, it has been Final Approved and the PO/APO has been created. As soon as a REQ is Final approved, the status goes to Closed.

Q. Why does the PO that is over the APO limit say unapproved?

A. Unapproved displays on all PO’s that have not yet hit Final – so if an APO requires approvals on the PO side (by Budget, C&G or Tax), or if it is set to Print but not yet Printed, you will see Unapproved. As soon as all approvals and printing are complete, the PO can reach Open/Final status.

Q. What does it mean when the REQS says final, closed?

A. When a REQ has received all departmental approvals, the status becomes Final/Closed; at that point, the PO process begins – if all APO rules are met, an APO is generated, and the APO routes for PO approvals; If APO rules fail, the REQ routes to Purchasing to complete the PO.