1. **What is a Requisition?**
A Requisition is a document in the Kuali Financial System (KFS) utilized to request the purchase of various goods or services from outside vendors. This document is submitted to Procurement Services, at certain dollar amounts, by a department to initiate a purchase and authorize a specific account or specific account(s) to be charged for the purchases. There are two types of Requisitions; Catalog (Shop Catalogs) and Non-Catalog (Requisition). The Requisition is NOT a Purchase Order.

2. **What is a Catalog Requisition?**
A Catalog Requisition is a Requisition created from an online shopping experience in Shop Catalogs. The KFS Requisition will auto populate all required fields except the accounting information (i.e., account number, object code and percent). A Catalog Requisition is considered a Quantity requisition for receiving purposes.

3. **What is Shop Catalogs?**
Shop Catalogs is the University’s online marketplace where users can shop directly on a vendor’s website, add items to their cart and check out.
4. **Do I need to do anything special before initiating my first Requisition?**
   Yes, you need to touch the system so the system can recognize you. Before initiating your first Requisition, for both catalog and non-catalog, follow these steps:
   1. Click on Shop Catalogs
   2. Let the page load
   3. Click on Main Menu to return to the KFS homepage
   4. Initiate your first requisition

5. **What is a Non-Catalog Requisition?**
   A Non-Catalog Requisition is used for non-catalog vendors. The user will be required to input a thorough description, vendor name, items, account information (i.e., account number, object code and percent) in the Non-Catalog Requisition document. Please attach the quote, SOW, etc.

   A Non-Catalog Requisition can be initiated as a “Quantity” and/or “No Quantity” Requisition.

6. **When should a “Quantity” Non-Catalog Requisition be used?**
   A Quantity Non-Catalog Requisition should be used when we are buying a set number of items from a non-catalog vendor. **NOTE:** The Non-Catalog Requisition must match the vendor’s quote (i.e., lined out). A Non-Catalog Requisition can have both Quantity and No Quantity lines.

7. **When should a “No Quantity” Non-Catalog Requisition be used?**
   A No Quantity Non-Catalog Requisition should be used when we are buying goods on an as-needed basis during a certain period of time (open purchase order) and for services (i.e., software, maintenance agreements, events, consultants, etc.). An open purchase order should not be requested for Shop Catalog vendors. A Non-Catalog Requisition can have both Quantity and No Quantity lines.

8. **When will a Requisition become an Automatic Purchase Order (APO)?**
   - A Catalog Requisition will become an APO when the amount is $10,000.00 or less for catalogs NOT compliant with Federal Uniform Guidance.
- A Catalog Requisition will become an APO when the amount is $50,000.00 or less for Federal Uniform Guidance Compliant Catalogs.
- A Non-Catalog Requisition will become an APO when the amount is $10,000.00 or less.

9. **When is receiving required?**
   Receiving is required for Quantity requisitions greater than $5,000.00. No Quantity requisitions do not require receiving.

10. **When is a written vendor quote required?**
    A written quote should be obtained for any non-catalog requisition $500.00 or more. For open purchase orders, written documentation is required showing price. A quote can be a formal vendor quote, a screen shot from a website, an email, etc. The quote must show vendor name, what is being purchased, quantity, and unit cost.

11. **I have a vendor quote with X (number of) lines. What is the best way to line out the requisition to match the quote?**
    There are three (3) ways to accomplish this:
    - a. If you are using a Shop Catalog vendor, most offer a quote to order function which allows the end-user to pull the quote directly from the catalog into their cart.
    - b. You can import the quote by using the Import Lines feature in KFS. To do this, request a CSV file from the vendor that follows the format below. The file cannot include a commodity code or dollar sign in the Unit Cost field. Remove the row headers (i.e., Quantity, UOM, Catalog, etc.) before importing the quote into your requisition.
    - c. Manually enter each line from the quote to the requisition.
12. What information is required on a Requisition?

- Required fields marked with an asterisk (*)
- Vendor (selected from the vendor database)
- Items tab completed as Quantity and/or No Quantity
  - UOM is a required field with a Quantity line
- Account Number and Object Code
- Notes and Attachments

13. When should I send notes and/or attachments to the vendor?

If the Requisition will create an APO, include any notes and/or attachments for the vendor and select Yes. If the Requisition will route to Procurement Services, do NOT select Yes for any notes and/or attachments.

Please be cognizant of sending internal communications (i.e., purchase request forms, funding request forms, email communications, etc.) to the vendor. Internal communications should be segregated from external communications. Please be sure attached files have descriptive file names such as quote, contract, agreement, email versus scan, docs, STKM12345, etc.

14. What is the difference between Ad Hoc FYI, Approve or Acknowledge?

Ad hoc allows users to create custom routing for that particular document. The following types of route stops can be added for an individual person, or to a group:

- **FYI** - FYIs do not interrupt the normal workflow routing of a document but give a user view access and allows them to signify they’ve taken action. FYI requests can be cleared directly from the action list without opening the document.
- **Acknowledge** - Acknowledgements do not interrupt the normal Workflow routing nor stop a document from routing on to other individuals or workgroups who need to take approval actions. It allows you to make a user aware of a given document. However, if a person or group fails to acknowledge a document the request remains is in Processed status and causes issues with reporting. Please be sure any person or group you acknowledge, takes action.
- **Approve** - This type of stop will require the user take the approval action prior to it moving forward in workflow. Approval must be done by the individual/group assigned before it can complete or proceed in routing.

15. When should I initiate a Requisition for $10,001?

A Non-Catalog Requisition should be initiated for $10,001 when there is a contract/agreement/form (i.e., hotel, event, moving, software, consultant, etc.) requiring signature or has terms and conditions. This will allow the Requisition to route to Procurement Services through workflow to determine best next steps.
16. I put a note for the vendor in the “Delivery Instructions” field of the Requisition but they did not receive it. Why?

Any information included in the Delivery Instructions field and/or the Notes to Vendor field will NOT be transmitted to the vendor. If you need to send a note to the vendor, include those notes in the Notes and Attachments tab and select Yes.

17. Why did my Requisition error?

This could occur for a few reasons.

- There were fields populated in the Requisition that are problematic. Avoid the following fields:
  - Additional Suggested Vendor Names (under Vendor tab)
  - Additional Institutional Information tab
  - Restricted box (at the line item)
- Vendor was not selected from the vendor database.
- The initiator did not “touch” the system before initiating the Requisition.

18. My delivery information in the Requisition is correct yet my delivery went to another location on campus. Why?

There are various reasons why the delivery did not end up where you wanted it to go.

- The Final Delivery fields are problematic and must NOT be used to reflect where you want your delivery to go.
- Use the Receiving Address to reflect the final delivery address of where you want the items to be delivered via Central Receiving.
- Use both the Receiving Address section and Address Profile in Shop Catalogs for desktop deliveries.
19. I don't see my shipping address in KFS and/or Shop Catalogs. How do I get it added?
   Requests to add shipping addresses to KFS and/or Shop Catalogs can be sent via email
to BFS KFS Operations.

20. Are there any restrictions related to items being shipped to a personal residence?
   We should never have University goods delivered to a personal residence.

21. I need to initiate a Requisition for an event. Is there anything special I need to do?
   An event is any request for performers, speakers, catering, room reservations,
   receptions, workshops, etc. Include the date(s) of the event in the Description field of
   the first line item of the requisition. If alcohol is being served, this expense should be on
   a separate line with the appropriate account number and object code per the
   University's FPI.

22. A consultant or vendor was specifically named in my proposal. Is this sufficient
    justification for a directed purchase?
    No, this is not sufficient justification for a directed purchase. The Sponsor must provide
    a directed purchase letter stating the need to procure specific goods or services in order
    to comply with the terms and conditions of a sponsored project grant or contract.