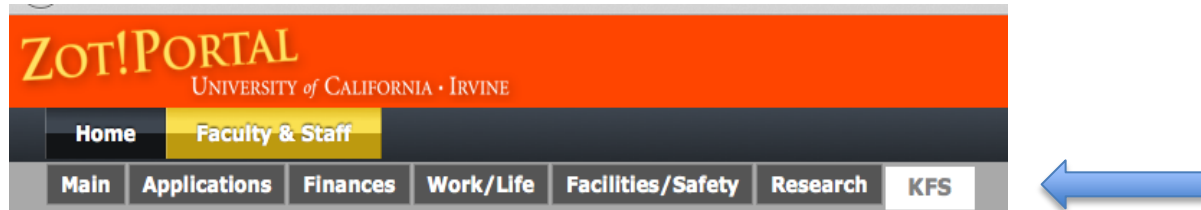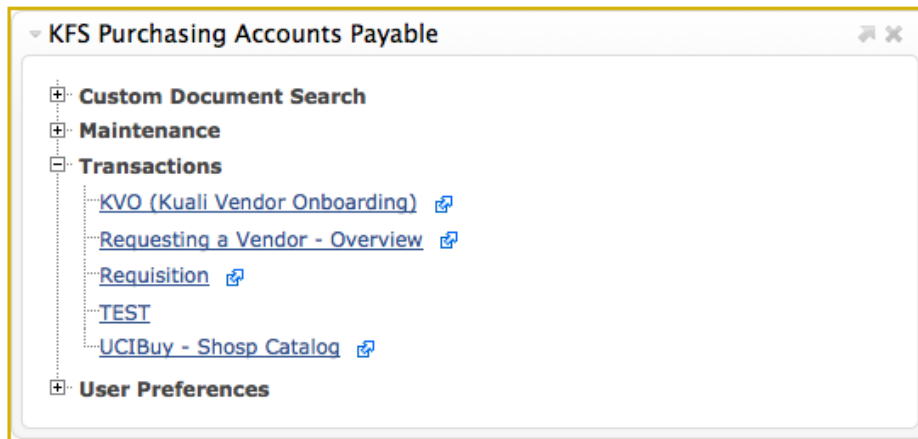# How to Create Purchase Order Requisition

Website: portal.uci.edu

1. Login with UCI Net ID
2. Click on "Faculty and Staff" tab
3. Click on "KFS" tab

4. Go to KFS "Purchasing/ Accounts Payable" section
5. Click on "Transactions"
6. Click on "UCI Buy" or "Requisition"

7. If you select UCI Buy follow these step: (For Requisition see next section)

- Select Vendor to shop or search under "Everything" to locate the best price
- Or select the Vendor you want to shop from
- Once all items are added in cart
- Click on view cart and check out/transfer cart
- Click on create KFS Requisition
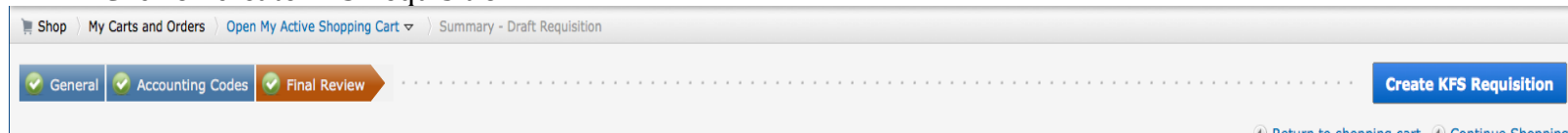
- Fill in/complete KFS Requisition Tabs (document, overview, delivery, vendor, and items tabs)
- Click on "Collapse all" in the upper right corner

- Click Show on Document Overview Tab (see below)
    - Add vendor name to the end of the description field (Do NOT overwrite prefilled text)
    - Enter Budget Code in the Organization Document number field (see below)
    - Enter in Explanation field (Justification, PI name and Fabrication # if relevant)
    - Click "Hide" document overview tab (see below)

Document Overview

* Description:	2014-07-02 KHRISLYP 01/ Fisher	
		Explanation: Research supplies for Project X in Dr. Guan's lab.
Organization Document Number:		

Financial Document Detail

* Year: 2015   Total Amount: 126.00

- Save at the bottom of the screen

calculate   submit   save   reload   close   cancel

- Vendor Tab and Items Tab is pre populated (Check to make sure it is correct)
- CREATE SEPARATE PO REQUESTS FOR CHEMICAL AND SUPPLY ITEMS DO NOT INCLUDE CHEMICALS AND SUPPLY ITEMS ON SAME REQUEST

Document Overview	▶ show
Delivery	▶ show
Vendor	▶ show
Items	▶ show
Capital Asset	▶ show
Payment Info	▶ show
Additional Institutional Info	▶ show
Account Summary	▶ show
View Related Documents	▶ show
View Payment History	▶ show
Notes and Attachments (0)	▶ show
Ad Hoc Recipients	▶ show
Route Log	▶ show

- For any notes or attachment for PS purchasing, click Show Notes and Attachments Tab (see below)

Notes and Attachments

	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:				Browse... No file selected. CANCEL		add

- Attach document(s) PDF only, then click Add tab at right
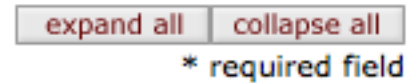- Click Calculate then Save and then Submit

The UCI Buy requisition will route to PS purchasing once you see the message Document Successfully Submitted in your upper left corner

For KFS Requisition follow these steps:

1. Complete KFS Requisition Tabs (document overview, delivery, vendor, items Tabs)

Document Overview	▶ show
Delivery	▶ show
Vendor	▶ show
Items	▶ show

2. Click "Collapse all" in upper right hand corner

expand all	collapse all

* required field

3. Click "Show" to fill out the Document Overview Tab

   - Enter vendor name in Description Field
   - Enter budget code in Organization Document Number field
   - Enter in Explanation field what project items are for, PI name and Fabrication # if relevant
   - Click "Hide" document overview tab

Document Overview ▾ hide

Document Overview

* Description:			Explanation:	
Organization Document Number:				

   - Save at the bottom of the screen

(calculate) (submit) (save) (close) (cancel)

4. Click "Show" Delivery Tab
   - Enter building name and room number (Rush orders requests and alternative off campus ship to address can be entered into Delivery Instruction box)
   - Click "Hide" delivery tab
   - Save at the bottom of the screen

Delivery ▾ hide

Final Delivery

* Delivery Campus:	IR - UC Irvine		* Delivery To:	PONCE, KHRISLYNNE
Building:	set as default building		Phone Number:	
* Address 1:			Email:	khrislyp@uci.edu
Address 2:			Date Required:	
* Room:			Date Required Reason:	
* City:				
State:			Delivery Instructions:	
Postal Code:				
* Country:				

5. Click "Show" Vendor Tab
   - Enter vendor name, address, telephone #, and contact name
   - Click "Hide" vendor tab
   - Save at bottom of the screen

Vendor	▾ hide

Vendor Address

Suggested Vendor:	[ ] 🔍 clear vendor	City:	[ ]
Vendor #:	[ ]	State:	[ ]
Address 1:	[ ]	Province:	[ ]
Address 2:	[ ]	Postal Code:	[ ]
Attention:	[ ]	Country:	[▾]

Vendor Info

Customer #:	[ ]		
Notes To Vendor:	[ ]	Payment Terms:	
		Shipping Title:	
		Shipping Payment Terms:	
Vendor Contact Name:	[ ] 🔍	Contract Name:	🔍
PO Transmission Fax Number:	[ ]	Supplier Diversity:	
PO Transmission Email:	[ ]		

6. Click "Show" Items Tab
   - Enter quantity, UOM, catalog #, commodity code #: 41121800, description, unit cost, then Add button on the right **enter in additional items as necessary (same as above)**
   - Click "Hide" items tab
   - Save at bottom of the screen
   - CREATE SEPARATE PO REQUESTS FOR CHEMICAL AND SUPPLY ITEMS DO NOT INCLUDE CHEMICALS AND SUPPLIES ON SAME REQUEST

Items	▾ hide

Add Item ?   import lines

Item Line #	* Item Type	Quantity	UOM:	Catalog #	* Commodity Code	* Description	* Unit Cost	Extended Cost	Tax Amount	Total Amount	Assigned To Trade In	Action
	Qty, taxable ▾	[ ]	[ ]🔍	[ ]	[ ]🔍	[ ]	[ ]	0.00			☐	add

setup distribution | remove accounts from all items | remove commodity codes from all items | expand all accounts | collapse all accounts | clear all tax

7. If adding notes to PS purchasing or attaching quotes, sole sources, or other documents
   - Click "Show" Notes and Attachments Tab
   - Add notes and/or attach documents (PDF only)
   - Click "Add tab" at right
   - Click Save then Calculate and then Submit at bottom of the screen

Notes and Attachments (0)	▾ hide

Notes and Attachments

	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:			[ ]	Browse... No file selected. CANCEL		add

The requisition will route to PS purchasing once you see the message Document Successfully Submitted in the upper left corner