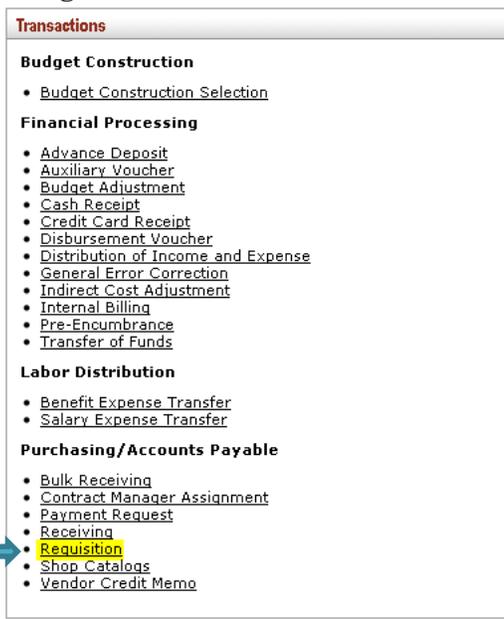
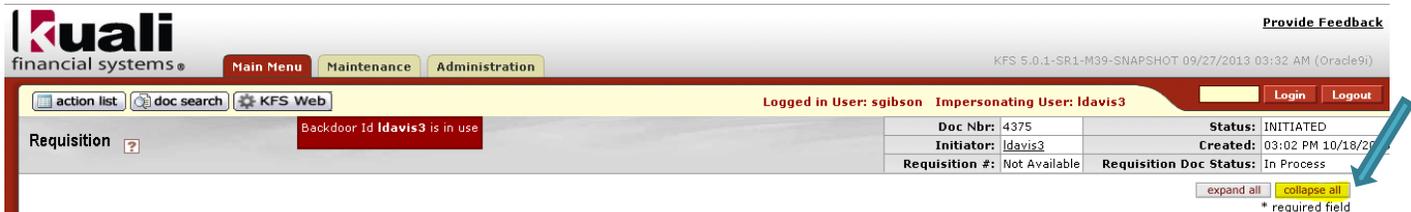


**IMPORTANT:**

SAVE your work frequently. CLICK ONLY ONCE per command. USE TABS TO RETURN TO EARLIER SCREENS rather than the back arrow.

**REQUISITION PROCESS**

Step	Action
1.	<p><b>Navigation:</b> Main Menu &gt; Transactions &gt; Purchasing/Accounts Payable &gt; Requisition</p> 
2.	To initiate a <b>Requisition</b> , click the <b>Requisition</b> link. 
3.	<p>Before you begin, you can choose to click the <b>collapse all</b> button in the upper right hand corner.</p> <p>To close all tabs, click the <b>collapse all</b> button.  This may make navigation easier.</p>



Step	Action
4.	<p>To open the <b>Document Overview</b> tab, click the <b>show</b> button. </p> 

Document Overview ▼ hide

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**Document Overview**

<b>* Description:</b>	Subaward - Con Fund For Env 07-4-5239990	<b>Expla</b>
<b>Organization Document Number:</b>		

**Financial Document Detail**

Step	Action
5.	Enter a <b>Description:</b> Type “ <b>SUBAWARD – [Subrecipient, Project Number]</b> ”. If the subrecipient’s legal name is long, an abbreviation is fine.
6.	<b>Organization Document. #:</b> Leave blank
7.	To close the <b>Document Overview</b> tab, click the <b>hide</b> button. <span style="float: right;">▼ hide</span>
8.	To open the <b>Procurement Address</b> tab, click the <b>show</b> button. <span style="float: right;">▶ show</span>

**Kuali financial systems** Provide Feedback

Main Menu Maintenance Administration KFS 5.0.1-SR1-M34 08/05/2013 11:05 AM (Oracle9i)

action list doc search Logged in User: aweimer Login Logout

**Requisition** Doc Nbr: 3467 Status: INITIATED

Initiator: aweimer Created: 04:29 PM 08/07/2013

Requisition #: Not Available Requisition Doc Status: In Process

expand all collapse all \* required field

**Document Overview** ▶ show

**Procurement Address** ▼ hide

<b>* Procurement Campus Code:</b>	City Name:
Procurement Name:	State:
Address 1:	Postal Code:
Address 2:	Country:
Phone Number:	

Step	Action
9.	To find the <b>Procurement Address</b> for <b>UMCES ORAA</b> click the <b>magnifying glass</b> button to select the correct Procurement Campus Code.
10.	To select the <b>UMCES ORAA Procurement Campus Code</b> click the <b>Procurement Campus Code</b> drop-down arrow button.
11.	Select the <b>SA – UMCES - Subawards</b> option from the drop-down menu; it’s the last on the list.

**Procurement Address** ▼ hide

**Procurement Address**

**\* Procurement Campus Code:**

**Procurement Address Lookup** ?

Search Tip: Place an \* before/after a word or phrase for which you are searching.

Procurement Campus Code:

Procurement Name:

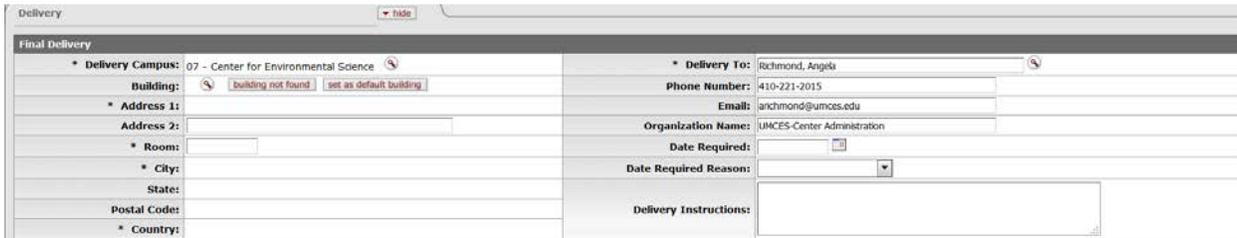
Procurement Line 1 Address:

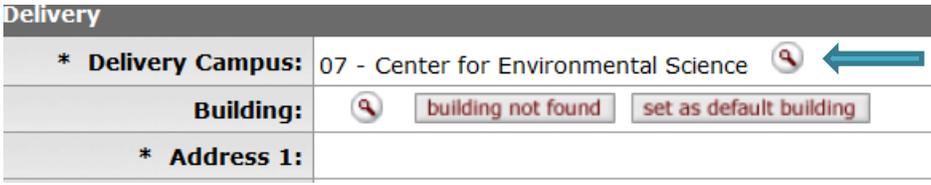
Step	Action
12.	To complete the search for the <b>Procurement Address</b> , click the <b>search</b> button. 
13.	To select the <b>Procurement Address</b> and add it to the <b>Requisition</b> , click the <b>return value</b> link. 

One item retrieved.

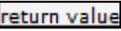
Return Value	Procurement Campus Code	Procurement Name	Procurement Line 1 Address	Procurement Line 2 Address	Procurement City Name	Procurement State Code	Procurement Postal Code	Procurement Country Code	Procurement Phone Number	Active Indicator
<a href="#">return value</a>	SA	UMCES Subaward	UMCES Office of Research Admin and Adv	P. O. Box 775	Cambridge	MD	21613	US	(410) 221-2014	Yes

Step	Action
14.	To close the <b>Procurement Address</b> tab, click the <b>hide</b> button. 
15.	To open the <b>Delivery</b> tab, click the <b>show</b> button. 



Step	Action
16.	<b>The information that pre-populates here is incorrect for subawards and needs to be changed.</b> To select the required <b>Delivery</b> information for <b>UMCES ORAA</b> , click the <b>magnifying glass</b> button for Delivery Campus.  



Step	Action
17.	Click the <b>clear</b> button.  to remove the pre-populated <b>Campus Code</b> .
18.	To search for the address, click the <b>search</b> button. 
19.	To select the <b>Delivery</b> address for UMCES Subawards and add it to the <b>Requisition</b> , click the <b>return value</b> link.  The correct Campus Code is SA, the last on the list.

11 Items retrieved, displaying all items.

Return Value	Campus Code	Campus Name
<a href="#">return value</a>	01	College Park
<a href="#">return value</a>	04	Eastern Shore
<a href="#">return value</a>	07	Center for Environmental Science
<a href="#">return value</a>	08	University System of Maryland Office
<a href="#">return value</a>	20	Consolidated Reporting
<a href="#">return value</a>	DS	College Park - Dining Services
<a href="#">return value</a>	FM	College Park - Facilities Management
<a href="#">return value</a>	FI	College Park - Freight
<a href="#">return value</a>	IT	College Park - Information Technology
<a href="#">return value</a>	OR	College Park - Office of Research Admin
<a href="#">return value</a>	SA	UMCES - Subawards



Step	Action
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20.	To select a <b>Building</b> , click the <b>magnifying glass</b> button. 
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**Building:** 

21.	The <b>Campus Code</b> will be prepopulated. To search for the desired <b>Delivery Address</b> click the <b>search</b> button. <input type="button" value="search"/>
-----	--

**Building Lookup** 

Search Tip: Place an \* before/after a word or phrase for which you are searching.

Campus Code:	SA 
Building Code:	<input type="text"/>
Building Name:	<input type="text"/>
Building Street Address:	<input type="text"/>
Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both

One item retrieved.

Return Value	Campus Code	Building Code	Building Name
<a href="#">return value</a>	SA	SUBAWARD	UM Center of Environmental Science

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

22.	To select the <b>Building</b> and add it to the <b>Requisition</b> , click the <b>return value</b> link. <input type="button" value="return value"/>
-----	--

Step	Action
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23.	There is no room number required for Subawards. Enter " <b>NO_ROOM</b> " in the <b>Room</b> field.
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\* **Room:**  

**Delivery**

**Final Delivery**

* <b>Delivery Campus:</b>	SA - UMCES - Subawards 
<b>Building:</b>	UM Center of Environmental Science  <input type="button" value="building not found"/> <input type="button" value="set as default building"/>
* <b>Address 1:</b>	ORAA Subaward, P.O. Box 775
<b>Address 2:</b>	<input type="text"/>
* <b>Room:</b>	NO_ROOM 
* <b>City:</b>	Cambridge
<b>State:</b>	MD
<b>Postal Code:</b>	21613
* <b>Country:</b>	United States

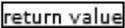
**Receiving Address**

24.	To close the <b>Delivery</b> tab, click the <b>hide</b> button. 
25.	<b>Save</b> Click the save button at the bottom of the requisition to save it before continuing. 
26.	To open the <b>Vendor</b> tab, click the <b>show</b> button. 

Step	Action
27.	The user will need to populate the <b>Vendor</b> for the requested Subaward. To search for a <b>Vendor</b> click the <b>magnifying glass</b> button. 
28.	Search for the <b>Vendor</b> listed on the PO, using part of the vendor name and wildcards (*) before and after (ex. *Univ* *Mich* for the University of Michigan). Go Blue! 
29.	To complete the search for the <b>Vendor</b> , click the <b>search</b> button. 

3 items retrieved, displaying all items.

Return Value	Vendor Name	Search Alias	Vendor #	Active Indicator	Vendor Type	State	Commo
<a href="#">return value</a>	UNIVERSITY OF MICHIGAN		31288-0	Yes	PQ	MICHIGAN	CNV UMDSUB
<a href="#">return value</a>	UNIVERSITY OF MICHIGAN		32422-1	Yes	PQ	MICHIGAN	20400
<a href="#">return value</a>	UNIVERSITY OF MICHIGAN		32423-0	Yes	PQ	MICHIGAN	96364 CNV UMDSUB

Step	Action
30.	To select the <b>Vendor</b> and add it to the <b>Requisition</b> , click the <b>return value</b> link.   <b>NOTE:</b> In this example we are using the University of Michigan. The <b>Vendor</b> used on a Subaward <b>Requisition</b> should be the <b>Subrecipient</b> specified on the Subaward. However, please note that no Vendor will ever be more a-Maize-N-Blue than the University of Michigan. Just stating facts, people.
31.	<b>Vendor Address:</b> Check the vendor address. If a different address is needed, use the magnifying glass next to Address Line 1 to select a different address. <b>The address should normally be found on one of the "remit" lines.</b> To search for a different <b>Address</b> click the <b>magnifying glass</b> button.  <b>PLEASE NOTE – Its is VERY IMPORTANT to select the correct Vendor with the correct remit address, If the Vendor name or address is not in the system, PLEASE SAVE THE REQUISITION AND RETURN TO THE COMPLIANCE ADMINISTRATOR along with a note explaining the problem.</b>

Search Tip: Place an \* before/after a word or phrase for which you are searching.

Address Type:	<input type="text"/>
Address 1:	<input type="text"/>
Address 2:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Postal Code:	<input type="text"/>
Province:	<input type="text"/>
Country:	<input type="text"/>
Attention:	<input type="text"/>
URL:	<input type="text"/>
Vendor Fax Number:	<input type="text"/>
Email Address:	<input type="text"/>
Active Indicator:	Yes
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

4 items retrieved, displaying all items.

Return Value	Address Type Description	Address 1	Address 2	State	City	Postal Code	Country
<a href="#">return value</a>	REMIT	REGENTS OF UNIV MICHIGAN	BOX 223131	PA	PITTSBURGH	15251-2131	US
<a href="#">return value</a>	PURCHASE ORDER	SOC RES CHILD DEVELOPMENT	3131 S STATE ST STE 302	MI	ANN ARBOR	48108-1623	US
<a href="#">return value</a>	REMIT	CONTRACT ADM - 2044 WOLVERINE	3003 S STATE ST	MI	ANNA ARBOR	48109-1273	US
<a href="#">return value</a>	PURCHASE ORDER	CONTRACT ADM - 2044 WOLVERINE	3003 S STATE ST	MI	ANNA ARBOR	48109-1273	US

Step	Action
32.	To select the <b>Address</b> and add it to the <b>Requisition</b> , click the <b>return value</b> link. <input type="button" value="return value"/>

## Vendor Address

**Suggested Vendor:** UNIVERSITY OF MICHIGAN

**Vendor #:** 32423-0

**Address 1:** 5082 WOLVERINE TOWER

**Address 2:** 3003 S. STATE STREET

**Attention:**

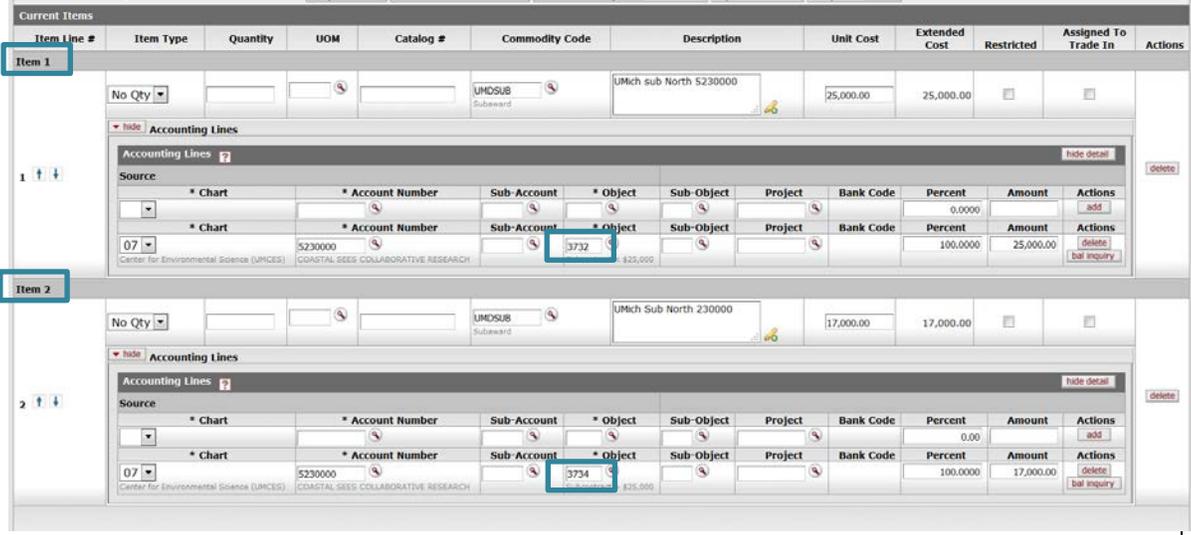
Step	Action
33.	To close the <b>Vendor</b> tab, click the <b>hide</b> button. <input type="button" value="hide"/>
34.	To open the <b>Items</b> tab, click the <b>show</b> button. <input type="button" value="show"/>

Item Line #	* Item Type	Quantity	UOM:	Catalog #	* Commodity Code	* Description	* Unit Cost	Extended Cost	Restricted	Assigned To Trade In	Action
	Qty <input type="text"/>	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="add"/>						

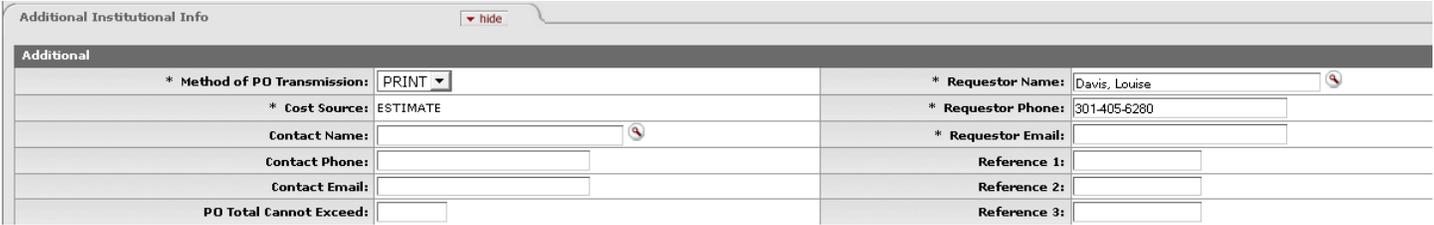
Step	Action
35.	To select the <b>Item Type</b> , click the <b>Item Type</b> drop-down arrow button. <input type="button" value=""/>
36.	<b>Item Type:</b> Select the <b>No Qty</b> option from the drop-down menu. <input type="button" value="No Qty"/>
37.	<b>Commodity Code</b> is a required field. For Subawards enter " <b>UMDSUB</b> " in the <b>Commodity Code</b> field.
38.	<b>Line Item Description:</b> Enter brief description including PI's name and account #.
39.	<b>Unit Cost:</b> Enter the Total Amount Obligated to the Sub in the <b>Unit Cost</b> field

Step	Action
40.	<p><b>Add:</b> Click the Add button at the end of the line to add it to the PO. To add the <b>Item</b>, click the <b>add</b> button. </p> 
41.	<p><b>TIP:</b> Add a 2<sup>nd</sup> line item for all costs that will be charged to object code 3734 subcontract &gt;\$25,000. Use separate line items for object code 3732 and 3734.</p>
42.	<p><b>Errors:</b> Look for error messages, if there are any, correct your errors and then click the add button again. Make sure that your item has been added before moving on to the next step.</p>
43.	<p><b>Enter each line item for EACH Object Code.</b></p>

**TIP:** Pay attention to which Accounting Line is opened, there are several on the Requisition. Make sure to select the accounting line next to Item 1 and repeat for Line Item 2.

Step	Action
44.	<p>Next accounting lines need to be added. To open the <b>Accounting Lines</b>, click the <b>show</b> button. </p>
45.	<p><b>Chart code:</b> enter chart code <b>07</b> using the drop-down arrow button. </p>
46.	<p><b>Account number:</b> Enter the KFS account number.</p>
47.	<p><b>Object code:</b> Enter the first object code: REMEMBER: the funds will need to be split by object codes 3732 or 3734.</p>
48.	<p><b>Amount:</b> Enter the amount for that object code.</p>
49.	<p><b>Add:</b> Click the Add button at the end of the accounting line to add it to the PO. To add the <b>Accounting Line</b>, click the <b>add</b> button. Repeat Steps 45-49 for the next object code line  <b>Note: Object codes 3732 and 3734 must be entered as Separate Items!</b></p> 
50.	<p><b>Errors:</b> After clicking the add button make sure that there were no errors and your line was added before trying to add a new one.</p> <p>1. <b>Errors</b> Read the messages and correct any other errors that came up. Then click the add button again. Make sure that your line has been added before moving on to the next line or the next step.</p>

Step	Action
51.	Verify that the account information was added to the <b>Requisition</b> .
52.	To close the <b>Items</b> tab, click the <b>hide</b> button. 
53.	To open the <b>Additional Institutional Info</b> tab, click the <b>show</b> button. 



Step	Action
54.	<p><b>Requestor Name:</b> Search for and return the <i>Requestor Name</i> found on the Sub Request form on the Administrative Point of Contact line. (This should automatically update the phone and email address fields.) This process is identical to the “Delivery To” search earlier in the process.</p> <p>* <b>Requestor Name:</b> <input type="text" value="Davis, Louise"/> </p>
55.	<p><b>Go to Notes and Attachemnts.</b> Attach all relevant subaward files, including scope of work and budget for the subrecipient.</p> 
56.	<b>Complete the Requisition.</b> All of the required fields have been completed and the <b>Requisition</b> is ready to be finalized.
57.	To <b>Save</b> the <b>Requisition</b> , click the <b>Save</b> button. 
58.	To <b>Calculate</b> the <b>Requisition</b> , click the <b>Calculate</b> button. 
59.	<p><b>Error Check</b> If your Requisition was successfully approved you will be returned to the main menu screen. If there were errors you will be returned to the Requisition screen so that you can correct the errors.</p> <ol style="list-style-type: none"> <li>1. If you receive an error noting that an accounting line cannot contain 0% do the following: <ol style="list-style-type: none"> <li>1. Check that the amounts entered for your accounting lines are correct. If not, correct them and return to steps #48-52.</li> <li>2. If the amounts were correct, locate the accounting line with 0.00% in the percent box. Add the dollar amount from that line to one of the other lines. Delete the line with the 0.00% in the percent box. Then go back to step #9.</li> </ol> </li> <li>2. Once all errors have been corrected, return to steps #57-59.</li> </ol>
60.	Send the completed Request to Issue a Subaward form to ORAA for processing.