Kuali Requisition Exercise

Activity	Service Purchase Requisition Creation
Objective	Create PR for Open Purchase Orders
Steps	**1**. Access the Kuali Main Menu page. **2**. Select ***Requisition*** from the ***Purchasing/Accounts Payable*** menu under the ***Transactions*** window. **3**. With the ***Requisition*** open, click on ***collapse all*** (upper right hand corner) to view all tabs associated with the PR. Note: All data fields marked with an asterisk require input. **4**. Click the ***Show*** button on the ***Document Overview*** tab to expand the folder. Enter a description for your requisition and click the ***Hide*** button to collapse the folder. **5**. Open the ***Delivery*** folder to enter your campus delivery information. Click on the search button (magnifying glass icon) to the right of the ***Building*** field in order to search either by building code or building name. In the ***Building Name*** field, enter the first few letters of your building's name followed by * (ex. **john***) and click the ***search*** button. Find your building and click ***Return Value*** to return that information to your requisition. Next, enter your ***Room*** number and click ***set as default building*** to retain your information for future requisitions. Hide the ***Delivery*** folder. **6**. Open the ***Vendor*** tab and click on the search button to the right of the ***Suggested Vendor*** field in order to search for your vendor. In the ***Vendor Name*** field, type **gall*** and click on search button, then select Gallagher Benefit Services Inc as your vendor. Click ***Return Value*** to return the vendor information to your requisition. Click the ***Hide*** button. **7**. Click the ***Show*** button on the ***Items*** tab to expand the folder. Add a line item by clicking the down arrow to the right of the window under the ***Item Type*** *and select* ***No Quantity***, do not put anything in ***Quanity***, ***Unit of Measure, Catalog #***, and ***Commodity Code,*** and entering a ***Description*** of **Open Purchase order for the purchase of (list description of materials or service)** **for use by the (dept name) dept. only.** **Period: (list time frame)** **Bid expires: (if applicable)** **Single order not to exceed $xxxxxxx.xx** **Total order not to exceed $xxxxxxxx.xx Persons authorized to request delivery:** **(list first and last names)** **Previous PO: Pxxxxxx** and a ***Unit Cost*** of **6000**. Click the ***Add*** button to add the line item to your requisition. **8**. Remaining in the ***Items*** folder, click ***setup distribution*** (this is above the lines that you have added) to apply account information to your requisition. Within the ***Chart Code*** field, select **CO** and tab over to the ***Account Number*** field. Click the search button in the ***Account Number*** field and search for your account number by entering **1357***. Select account number **1357020** and return that information to your requisition. Next, click into the ***Object Code*** field and search for an object code by clicking on the magnifying glass and using the ***Historical Financial Object Code*** field (ex. ***4010***) and return that information to your requisition. Be sure the percentage totals 100% and click ***Add***. Finally, click ***distribute to items*** to apply the account to your requisition. ***Save*** your requisition by clicking on the save button at the bottom of the page. Click the ***hide*** button. **9.** Submit your requisition by clicking the ***Submit*** button at the bottom of the page.