

Kuali Requisition Exercise

Activity	Service Purchase Requisition Creation
Objective	Create PR for Subawards
Steps	<ol style="list-style-type: none"> 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 Quantity, Unit of Measure, Catalog #, and Commodity Code, and entering a Description of Subaward Title: Study of Frogs, CSU Principal Investigator: Dr. Jones and a Unit Cost of 25000. Click the Add button to add the line item to your requisition. Under the line you have just added, Click the Show button located next to the Accounting Lines title. 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 5300*. Select account number 5300080 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. 7510) and return that information to your requisition. Click, the Percent field, enter 100 and click Add. Click the setup distribution that is above your Current Items line that you just added. 8. Add a line item by going to the line just below Add Item clicking the down arrow to the right of the window under the Item Type and select No Quantity, do not put anything in Quantity, Unit of Measure, Catalog #, and Commodity Code, and entering a Description of Split funding and a Unit Cost of 75000. Click the Add button to add the line item to your requisition. Under the line you have just added, Click the Show button located next to the Accounting Lines title. Within the Chart Code field, select CO and tab over to the Account Number field. Enter account number 5300080 and tab 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. 7550) and return that information to your requisition. Click, the Percent field, enter 100 and click Add. 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.