INSTRUCTIONS FOR PROCESSING FY18 REQUISITIONS

https://kuali.uconn.edu/kfs-prd/portal.do

To create a NEW requisition for FY18, skip to number 1 below.

To RENEW a current FY17 purchase order for FY18, please do the following:

1. Search for the current FY17 purchase order you would like to renew.
2. “VIEW RELATED DOCUMENTS” tab, click SHOW, click on REQUISITION #######.
3. Scroll to the bottom of the requisition document, click “COPY”, this will create a new requisition.

*If “ACCOUNT DISTRIBUTION” is “SEQUENTIAL,” DO NOT copy. Skip to number 1 below to create a new requisition.

When copying prior year requisitions, pay special attention to the following tabs:

- **Delivery Tab**: Update contact person name, phone, email.
- **Vendor Tab**: Scroll to “Vendor Info”. Confirm/update fax number.
  - IMPORTANT NOTE: PO’s with old, invalid fax numbers will FAIL and will not go out to the vendor.
  - 860-486-5051 is NOT a valid vendor fax number.
- **Items Tab**: Update “item descriptions and dates” as necessary.
- **Payment Info Tab**: Update “beginning and ending dates.”
- **Additional Institutional Info Tab**: Update “requestor name, phone and email.”

Complete the remainder of the requisition as usual, with the following differences:

1. **Document Overview**:
   - Description: Type “FY18” – only if you are entering an order for FY18.
   - Org Doc number: Enter previous PO# - this would be for reoccurring PO’s only.

Financial Document Detail:
- Select the appropriate Fiscal Year from the drop down box.

2. Continue to complete your requisition as you normally would.

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ADDITIONAL REMINDERS

1. Please provide complete descriptions for line items, including the words, “Blanket Order,” or “Service Maintenance.” Enter the term of the PO, etc.

2. As always, all pertinent information MUST be attached to your requisitions, including any agreements, sole source justification forms, quotes etc.

3. Payment Info Tab must be completed for all recurring PO’s by entering the start and end date.

4. A FY18 requisition, involving an agreement or license, is subject to review by the Attorney General’s Office and may require additional processing time.

How to get a report that lists all current year renewable orders that may require a new FY18 order

In the Kuali Financial Data Mart under KFDM → Standard Financial Reports → Standard Reports → Purchasing

There is a report called “Recurring Purchase Orders.” This report can be run using a variety of criteria and will provide a list of current year renewable purchase orders.

For general instructions on how to process requisitions in KFS, please see the KFS Purchasing Procedural Guide.

Please call the HuskyBuy Help Line, 860-486-2BUY (2289), with any questions.