KFS Purchasing
A Procedural Guide for Kuali Financial Systems eDocs
Procurement Services
Version 1/25/2017
# Table of Contents

<table>
<thead>
<tr>
<th>EDoc / Process</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logging into KFS for the first time</td>
<td>3</td>
</tr>
<tr>
<td>Automatic Purchase Orders (APO)</td>
<td>4</td>
</tr>
<tr>
<td>Non Catalog Requisition (REQ)</td>
<td>5</td>
</tr>
<tr>
<td>What object code is used for equipment?</td>
<td>11</td>
</tr>
<tr>
<td>Catalog Requisitions – HuskyBuy</td>
<td>15</td>
</tr>
<tr>
<td><strong>Other requirements when creating Requisitions</strong></td>
<td></td>
</tr>
<tr>
<td>E H &amp; S requirements for the receiving address when ordering lab/research chemicals</td>
<td>23</td>
</tr>
<tr>
<td>Proper Object/Commodity Codes for EHS Restricted Purchases</td>
<td>25</td>
</tr>
</tbody>
</table>

## Need Help?

- **Nancy Patrylak**  
  860-486-2622

- **Elise Fiorentino**  
  860-486-5924

- **Jeremiah Macht**  
  860-486-1657

- **Purchasing Help Line**  
  860-486-2289 (2BUY)

## KFS Tips and FAQs

[https://web9.uits.uconn.edu/financesystemsmedia/FAQs.html](https://web9.uits.uconn.edu/financesystemsmedia/FAQs.html)
If this is your first time entering a Requisition, follow the directions below. If you have been in the KFS Production site and have entered a Requisition or Renewal before, skip to Page 6.

Enter your NetID and Password

Once you enter your netid and password you will be in HuskyBuy. HuskyBuy needs to recognize your NetID the first time you enter a Requisition, regardless if it is a Non-Catalog Requisition or a Catalog Requisition. The reason for this is because all PO’s are delivered to the vendor electronically through HuskyBuy. If you do not complete this step prior to entering a requisition for the first time your PO will not be sent to the vendor. You will then be notified by Purchasing to complete this step.
Catalog vs Non-Catalog Requisitions
There are two types of requisitions you can create in KFS. There are catalog (HuskyBuy) or non-catalog (direct input to KFS). The advantage for using HuskyBuy is that you can shop using vendors in the marketplace and less data entry is required by the requestor because the requisition fields auto populate when returned to KFS. The other advantage is that the APO limit is higher for HuskyBuy requisitions. We are continually adding new vendors to the HuskyBuy website.

Automatic Purchase Orders (APO):
An APO is an Automatic Purchase Order. An automatic purchase order is sent directly to the vendor electronically through HuskyBuy once all approvals are met at the requisition level. The APO limit for a non-catalog requisition is $250 and a catalog (HuskyBuy) requisition is $5000. Purchasing does not review APO’s; therefore it is imperative that all required information or fields are completed.
How to enter a Requisition (Req) - Non-Catalog Vendor

Go to the Main Menu
Under Transactions,
Purchasing/Accounts Payable, Select Requisition

This will open a requisition document in KFS as shown below

Note: To make it easier to view you should click on the “collapse all” button at the top of the screen

Each eDoc you create in KFS will be assigned a “document number” which you can find in the upper right corner of the screen.
Now your screen should look like this:

Open and close the tabs as you need them to enter information. Open tabs by clicking “show” and close them by clicking “hide”.

**Document Overview:**

Enter a “description” for the requisition. If this requisition is a rush you should note it here, otherwise you can just put a brief description of what you are ordering. This is a 40-character field. Anything you put in this field will also show up in your action list or when you do a doc search. After entering in your description, click on the “save” button at
the bottom of the screen. Once you click on the “save” button your document will be assigned a “requisition number” which you will be able to search for by using the Doc Search screen. A saved document can also be found in your action list.

**NOTE:** All the other fields on this tab are optional.

The organization under “requisition detail” defaults in from your profile but can be changed by using the search key if needed.

**NOTE:** It is always a good idea to save your document often.

**Delivery:**

The Final Delivery field is the name of the building in which you are located. If this information does not auto populate you can set the default building address by clicking on the “magnifying glass”. Search for your building code, return the value, add the room number and then save the building by clicking on “set as default building”.

**NOTE:** This is not the address that populates the ship to area on the purchase order

Once the building is set as a default, KFS will recognize you based on your NetId and your building will auto populate each time you create a req. You will notice that the deliver to name, phone and email auto populates based on the initiator of the requisition but can be changed if necessary.
The receiving address is a required field and should be the address where the product is being delivered. This field will auto populate if there is a default receiving address associated with your org code. If the receiving address field is blank or incorrect you will have to search for the correct receiving address and then return value.

**NOTE:** The ship to area of the Purchase Order consists of the address entered in the receiving address field, the room# and Delivery To name entered on the Final Delivery tab

**Vendor:**
Search for the Vendor by clicking on the magnifying glass. This will bring you to the vendor lookup screen. Use wildcards (*) to get more results.
Click on “return value” next to the vendor you want to do business with. This will bring you back to your requisition and populate the vendor name and address. If the vendor you want to use does not come up in your search results you will have to complete a “vendor create” eDoc.

If the vendor address is not correct, click on the magnifying glass next to Address 1. This will bring you to a vendor address lookup screen and allow you to pick an alternate address.

For purchase orders please be sure to always pick a purchase order address. If the address you want to use does not appear on your search results you will have to “edit” the vendor through the Vendor Lookup Screen.

Note: If your vendor does not appear in KFS, you can visit PaymentWorks on the Accounts Payable site ap.uconn.edu
Items and Accounting lines:
Enter the following fields:

1. **Item type** – either quantity or no quantity  
   **Note:** Quantity would be used if you are ordering specific items. Non-quantity would be used if you expect more than one invoice on a particular line item. (Blanket orders)

2. **Quantity**

3. **UOM**

4. **Commodity Code**

5. **Description**

6. **Unit Cost**

Click “add” to add that line item to your requisition. A new blank line will come up to continue adding more lines if needed.

After adding all line items you will now need to set up your accounting information. There are two methods to enter accounting information:

1. **Setup Distribution Method** - This would be used if you have multiple lines with the same coding. You can enter the coding once and distribute it to all the line items. To use this method you should click “setup distribution” above the current items tab, enter the accounting information and then click “add”. After you have added the accounting lines you must click the “distribute to items” button. This will distribute the accounting information to all your line items.
2 **Show accounting lines on each line item** – This would be used if you only had one line item or if each line was coded differently. To use this you should click show under each line item and enter the accounting information for each line.

The information you enter in the accounting line is basically the same for either method.

**Note:** After adding one line of coding a new blank line will appear allowing you to split the funding by adding as many lines as necessary.

### How do I know what object code to use when purchasing equipment on a requisition?

It is important to use the proper object codes when purchasing equipment; improper use of equipment object codes will require a correction of the requisition by Inventory Control. In some cases, a GEC may need to be initiated by Inventory Control. Here are some general guidelines:

1. The unit cost of the equipment determines whether it is capital:
   a. If the individual piece of equipment is over $5,000, then it is capital. Use one of the “Over $5K” object codes.
   b. If the equipment is under $5,000, but is considered to be “Controllable,” use object code 8306.
   c. If the equipment is under $5,000, but is not “Controllable,” use object code 8307.
2. If you purchase 2 or more items that cost under $5K individually, but will make up one piece of equipment that costs over $5K, use one of the “Over 5K” object codes on all relevant lines.

3. Other costs:
   a. Shipping/freight costs and installation costs **ARE** considered part of the equipment cost.
   b. Warranties and training costs **ARE NOT** considered part of the equipment cost.

See [Equipment Object Codes Quick Reference Guide](http://www.kuali.uconn.edu/docs/Equipment%20Object%20Codes%20Quick%20Reference.pdf)

You can lookup Equipment Object Codes by going to KFS main menu.

**Capital Asset:** This tab is not being used currently.

**Payment Info:**
This is only used if your requisition requires a start and end date (used for blanket, maintenance, software license etc.)
Select the type of recurring payment from the drop down box.
   - Fixed Schedule, Fixed Amount
   - Fixed Schedule, Variable Amount
   - Variable Schedule, Variable Amount

Enter a beginning and ending date
Additional Institutional Info: No data entry required

Click “show” on the Account Summary tab – and then click refresh account summary. This will give you a snapshot of the line items and accounting information on your requisition.

View Related Documents: This tab will allow you to view any other related documents. Example: After your requisition has been approved by purchasing you will see your PO number on this tab.

View Payment History: This tab would show any payments made against the PO that was generated from this requisition.

Notes and Attachments: This is the tab you would use to attach any notes and attachments to your requisition.

In the “note text” field type a brief description of what you are attaching, browse for your file and “add” it to your document.
**Ad Hoc Recipients:** This tab would be used if you wanted to forward this document to someone else for approval, completion, FYI or acknowledgment. Select the “action requested,” enter the person’s Net ID and select “add” button.

Now click the “calculate” and then “submit” button at the bottom of the page. You will get a message at the top that says your document was successfully submitted.

**Route Log:**
View all pending and future workflow actions.
How to enter a HuskyBuy Requisition (Req)-Catalog Vendor

Now you will be in the HuskyBuy Website and your screen should look like the one below:

Go to the Main Menu
Under Transactions,
Purchasing/Accounts Payable,
Select Shop Catalogs

Shop Catalogs
You should click on the icon for the vendor you want to do business with and start shopping.

**Note:** Buttons within each vendor’s website may vary.

The example below is using Dell

Click on the Dell icon then punch out which will bring you to the Dell website customized with the University of Connecticut’s contract pricing.
In the search field at the top you can enter the item you want to purchase, select from standard configurations, customize your own configuration or retrieve an E-Quote.

In this example I am going to select a Mini Tower Desktop by clicking on the “Add to Cart” Button or click the checkbox and choose “Add Selected to Cart”. This will automatically bring you to your cart.

View your cart for accuracy, make any changes if necessary and then you can either continue shopping or check out. When your shopping cart is complete, you should click on the “Create Order Requisition” button.
This will bring you to the shipping screen.

Shipping option – The default is no charge but can be changed if needed.

Trade Compliance – Select the button next to I WILL NOT be exporting. Click “Continue”
Verify your requisition one more time and then click on “Submit Order Requisition”
You have a final opportunity to look at your cart in HuskyBuy and if everything looks accurate, click on the “Proceed to Checkout” button.

**NOTE:** When placing an order through HuskyBuy it is very important to remember that you must return to KFS to complete your requisition in order your purchase order to be sent to the vendor. Upon successful completion of your requisition in KFS and approval from your fiscal officer and, if applicable, the contracts and grants area, your purchase order will be sent directly to the vendor through HuskyBuy (if under the APO limit of $5,000).

You will be brought back into KFS to your requisition eDoc. You will notice in the upper right hand corner that your document has been assigned a doc number and requisition number.
Similar to a non-catalog requisition, the first thing you should do is click on the “collapse all” button to make it easier to view. Open each tab to fill in the appropriate information.

Document Overview: Enter a description and then click save at the bottom.

Delivery tab: Enter in the building and receiving address as you would for a non-catalog requisition if not already populated.

Vendor: This information will populate from HuskyBuy. Verify that all information is correct.

Items and accounting information: This information will populate from the cart you submitted from HuskyBuy. You will have to enter a commodity code on the lines. Line items can’t be amended. Verify that everything is correct and then enter in your accounting information similar to what you would do for a non-catalog requisition.

Click “Calculate” and then “Submit” at the bottom.
You can see that your requisition has been successfully submitted.

**Route Log:** View all pending and future actions.
Other Requirements when creating requisitions

New Process for when ordering Lab/Research Chemicals
All Lab/Research chemical now have to be shipped to Central Stores for inventory. The inventory process will apply to chemicals for lab/research use only. (This will not include compressed gases; microbiology media such as agars, broths and serums; buffers; test kits; radioisotopes; drugs and cleaning products.)

Orders may be processed either through Husky Buy or on regular requisitions. Orders must be for chemicals only. Please order supplies separately.

Step 1 – Delivery
Enter both the building abbreviation* and the room # in the Room field under Final Delivery

NOTE: This is the room where the chemical will reside

Always include the P.I.’s name in the Deliver To field

NOTE: Labs with a central delivery area will also have to include that delivery location - Building Code/Room number - in the Deliver To field following the P.I.’s name. (e.g.: P.I.’S NAME / TLS175)

*use the building abbreviations as assigned on page 2 of the Campus Map located at: https://www.uconn.edu/pdf/wholemap.pdf

Step 2 – Delivery
Click on the magnifying glass next to your Receiving Address:

Change the Organization Code to 1568 and hit Search
Select the Central Stores Chemical Receiving address (CS Chem) by clicking on return value:

<table>
<thead>
<tr>
<th>Return Value</th>
<th>Chart Code</th>
<th>Organization Code</th>
<th>Receiving Name</th>
<th>Receiving Line 1 Address</th>
<th>Receiving Line 2 Address</th>
<th>Receiving City Name</th>
<th>Receiving State Code</th>
<th>Receiving Postal Code</th>
<th>Receiving Country Code</th>
<th>Use Receiving Address Indicator</th>
<th>Default Indicator</th>
<th>Active Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>return value</td>
<td>UC</td>
<td>1368</td>
<td>Central Stores</td>
<td>24hr Divry Notice 860-686-6297</td>
<td>3 Discovery Drive, Unit 6114</td>
<td>Storrs</td>
<td>CT</td>
<td>06269-6114</td>
<td>US</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>return value</td>
<td>UC</td>
<td>1566</td>
<td>CS Chem</td>
<td>-</td>
<td>3 Discovery Drive Unit 6114</td>
<td>Storrs</td>
<td>CT</td>
<td>06269-6114</td>
<td>US</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The Receiving Address will be populated with the correct delivery address:

**Receiving Address**

*Receiving Address:*

- CS Chem
- 3 Discovery Drive Unit 6114
- Storrs, CT 06269-6114
- United States

**Step 3 – Items**

Use commodity code 85 on the line items:

<table>
<thead>
<tr>
<th>Item Line #</th>
<th><em>Item Type</em></th>
<th>Quantity</th>
<th>UOMs</th>
<th>Catalog #</th>
<th><em>Commodity Code</em></th>
<th><em>Description</em></th>
<th><em>Unit Cost</em></th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12545</td>
<td>85</td>
<td>lab chemical</td>
<td>11.50</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Use object code 6795 on the accounting lines:
Proper Coding for EHS Restricted Purchases

Commodity and Object codes for all Restricted Equipment and Restricted Material purchases as follows:

**EHS Restricted Equipment**

*Commodity Code 940 must be utilized for all equipment noted below (exception: use 930 for Biological Safety Cabinets or other Clean Air Devices), along with one of the following Restricted Object Codes:*

- **8226** Restricted Equipment >$5,000: Research equipment with a cost of $5,000 or more that is **not** federally funded. Includes Biological Safety Cabinets, Radiation Producing Equipment, Equipment containing Sealed Radioactive Sources, Lasers, X-Ray producing equipment, Particle Accelerators, Nuclear gauges, non-vented fume hoods and Nanoparticle producing equipment. *(Effective 7/1/12)*

- **8227** Restricted Equipment >$5K Federally Funded: Research equipment with a cost of $5,000 or more purchased with federal funds. Includes Biological Safety Cabinets, Radiation Producing Equipment, Equipment containing Sealed Radioactive Sources, Lasers, X-Ray producing equipment, Particle Accelerators, Nuclear gauges, non-vented fume hoods and Nanoparticle producing equipment. The equipment ownership on the purchasing KFS account is “University Title.” *(Effective 7/1/12)*

- **8228** Restricted Equipment >$5K Federally Owned: Research equipment with a cost of $5,000 or more purchased with federal funds. Includes Biological Safety Cabinets, Radiation Producing Equipment, Equipment containing Sealed Radioactive Sources, Lasers, X-Ray producing equipment, Particle Accelerators, Nuclear gauges, non-vented fume hoods and Nanoparticle producing equipment. The equipment ownership on the purchasing KFS account is “Federal Title.” *(Effective 7/1/12)*

- **8229** Restricted Equipment < $5K Other Owned: Research equipment with a cost of under $5,000 that will not be owned by UConn. Includes Biological Safety Cabinets, Radiation Producing Equipment, Equipment containing Sealed Radioactive Sources, Lasers, X-Ray producing equipment, Particle Accelerators, Nuclear gauges, non-vented fume hoods and Nanoparticle producing equipment. *(Effective 7/1/12)*

**EHS Restricted Materials**

*Required Commodity Codes and Object Codes to be utilized for:*

- **900** Radioactive Materials with Object Code 6785 Radioactives for: Radioactive material (RAM), radionuclides, radioisotopes, RIA kits, sealed sources, source material. *(Effective 7/1/2012). Additional Training Required for Order Initiator.*

- **910** Restricted Biological Agents with Object Code 6790 Restricted Materials for: Biological Select agents/biological toxins. *(Effective 7/1/2012)*

- **920** Restricted Chemicals with Object Code 6790 Restricted Materials for: Controlled substances, DEA list, chemotherapeutics. *(Effective 7/1/2012)*
NOTE: If an EHS restricted item is purchased through project funds or acquired without utilizing Kuali (e.g., equipment purchased on a Pro-Card, equipment obtained through PI’s own funds, or donated equipment), Fiscal Officers must inform EHS directly of laser or other restricted item purchases so that EHS may follow-up with associated compliance in the laboratories. If a Grant Fund Restricted or other Object Code is required, the EHS Restricted Commodity Code must still be used as this triggers the notification to EHS in Kuali. **Do not use generic Supply Commodity Codes for these EHS restricted items.**

Please direct any general questions to:

Environmental Health and Safety (EHS)
Office of the Vice President for Research
860-486-3613 or EHS@uconn.edu

or to the respective EHS Manager:

Biological Safety: David Cavallaro 860-486-3180 or david.cavallaro@uconn.edu
Radiation & Laser Safety: Amy Courchesne 860-486-5399 or amy.c@uconn.edu
Chemical Safety: Stefan Wawzyniecki 860-486-1110 or stefan.w@uconn.edu