OVERVIEW

KFS stores copies of every Requisition, Purchase Order, and Payment Request generated at Indiana University. To benefit from these documents, users must understand the KFS search tools.

This guide details helpful search tips, and provides a brief overview of the most useful features available for each document type.

Searching and Viewing Purchasing Documents
Creating Notes
Transmission Options
Using Copy
Adding Ad Hoc Recipients
Requisition and Purchase Order-Status Definitions

SEARCHING FOR DOCUMENTS

There are two ways to Search for Documents in KFS:

1. Click

OR

2. Use the Document Search field in the Purchasing Accounts Payable tab.

NOTE: The second type of Document Search provides more search options. If you do not know the document number, this is recommended.

RESULT: The Document Search page appears.

NOTE: Use the * wildcard to substitute for a string of unknown characters. For example, bio*, returns any vendor who’s name begins with ‘bio’.

1. Enter known values in the applicable fields. Combine multiple properties to focus results.

2. Click on the “detailed search”, and if known, select a document status to further limit the results. (Status Definitions)

NOTE: All PO and Requisition statuses are defined on the last page of this document.
3. When all known properties have been entered, click the **Search** button.

**RESULT:** Results appear below the search fields.

Click the **Route Log** link to see the name of the individual or team responsible for upcoming WORKFLOW approvals, along with a record of previous approvals or disapprovals.

4. KFS allows users to save and reuse their searches.

**Search Tips:**

**Did you get too many results?**

- You can sort the results in alpha-numeric order by the values found in any column. Simply click a column heading to sort, or click it twice to reverse the order.
- Add additional criteria to the search fields, and click **search** to narrow your results.

**Did the search fail to find what you need?**

- Select the “detailed search” to enter additional criteria.
- Verify all your criteria. If you are not certain that a field is correct, remove that property and try again. If necessary, click **Clear** to start with a clean slate.

**VIEW PURCHASING DOCUMENTS**

- View the **PO Status** or **REQ Status** in the search results to see the current status of the document at a glance. ([Status Definitions](#))

**RESULT:** The associated document appears.
NOTES
Click the Notes and Attachments tab to view the full record of all notes added to any given order.

Each note is stamped with a creation date, along with the name and email address of its author.

HOW TO CREATE A NOTE
1. Locate the document using the search tips described above.
2. Open the document by clicking its document number link in the list of search results.

RESULT: The associated order appears.
3. Select the Notes and Attachments folder.
4. Enter your note in the text field.
5. Click add to save the note!!
6. If you want the note to go to someone via email, enter an email address in the Notification Recipient field. If the note requires purchasing attention but you are unsure of the proper staff member, use purhelp@indiana.edu.

RESULT: The note is permanently saved to the document record.
7. Click send to send the email notification!!

RESULT: An email notification is sent to the entered address, prompting the recipient to review your note.

TRANSMISSION OPTIONS
In certain situations, excluding all “Shop Catalog” orders, a Purchase Order may need to be printed.

If it is an APO, a print notification will go to the Initiator’s Action List when final approved.

If a PO routes to Purchasing, Purchasing will print and mail. Add a note requesting the copy be sent to you if you need the PO.

If the Purchase Order is an APO (APO will display in the “Contract Manager” field), the requisition initiator can retransmit the PO directly from within KFS:

1. Open the Additional folder.
2. Select Fax, Print or No Print.
   - Select Fax to have the PO automatically faxed.
   - Select Print to make the PO available for printing by the initiator (for APOs) or by purchasing staff.
   - Select No Print to keep the PO stored in KFS, without providing a copy to the vendor.
**COPY**
To create a new requisition using a previous requisition as a template:

1. Locate the previous Requisition.
2. Click the Copy button that appears at the bottom of the document. Be sure to refresh the vendor and update item details as needed.
3. This option is only available for a limited amount of time if this is a Shop Contract requisition.

**AD HOC RECIPIENTS**
To request either a Person or a Group to be included in the routing of a document:

Select the Ad Hoc Recipients folder.

1. Add the Action Required: FYI, Approve, or Acknowledge.
2. Add the Person (userid).
3. Click on add. The document will now route to the individual or work group.

Go to the Procurement Services web site for more updates and training materials on KFS.

Office of Procurement Services

http://www.indiana.edu/~purchase/training/training.shtml
## REQUISITIONS AND PURCHASE ORDERS: STATUS DEFINITIONS

### PO STATUSES

**Awaiting Budget Approval** – An order has been approved by Purchasing and is waiting on approval by the Budget Office.

**Awaiting Contracts & Grant Approval** – An order has been approved by Purchasing and is waiting on approval by Contracts and Grants.

**Canceled** – Order was canceled before it was sent to vendor. No purchase order was transmitted.

**Closed** – An order has been processed to the vendor, goods received or services have been performed and the vendor has received payment.

**In Process** – The purchasing department is working on the order. It is important to note that purchasing is still negotiating the terms and conditions of the order therefore the order number should not be given to a vendor during this phase of processing.

**Open** – An order has been approved by Purchasing and sent to vendor for processing.

**Out for Quote** – Purchasing has requested pricing from vendors.

**Pending Amendment** – Purchasing is amending an order and it has not yet been re-routed/approved by Purchasing...payments cannot be made.

**Pending Print** – The order has been approved, the transmission method is Print, and the document has not yet been printed.

**Void** – Order was sent to the Vendor but then canceled PRIOR to any shipments.

### REQUISITION STATUSES

**Awaiting Accounting Lines** – Requisition submitted w/o account detail and the department does not have Content Routing in place. Is waiting for initiator to add Account detail.

**Awaiting Base Org Review** – The requisition has been approved by the fiscal officer (or their delegate) and an organization associated with an account on the document has met the criteria for a base org approval (optional route level).

**Awaiting Content Approval** – The requisition needs to be approved by a content approver. This is an optional route level that occurs before the sub account approval level.

**Awaiting Contract Manager Assignment** – The requisition has been fully approved, has failed to become an APO and is waiting for purchasing to assign the requisition to the contract manager who is responsible for the commodity that is being requested.

**Awaiting Fiscal Officer** – The requisition needs the approval of 1 or more fiscal officer (or delegate). This is a required approval level for all requisitions.

**Awaiting Separation of Duties** – Any requisition where the total is greater than $10,000, the initiator of the requisition and the fiscal officer are the same person and no other approvals were given will automatically require this approval.

**Awaiting Sub Account** – The requisition needs approval of the sub account approver. This is an optional route level that occurs after content review and before fiscal officer review.

**Canceled** – The requisition was canceled before the document was routed. The goods or services have not and will not be ordered.

**Closed** – The requisition has been fully approved and a purchase order document has been initiated.

**Contract Manager Assigned** – A contract manager has been assigned to work on the document; however the purchase order has not been initiated.

**Disapproved - Base Org Review** – The base reviewer disapproved the requisition. This means that the goods or services have not and will not be ordered.

**Disapproved - Content** – The content reviewer disapproved the requisition. This means that the goods or services have not and will not be ordered.

**Disapproved - Fiscal** – The fiscal officer (or delegate) disapproved the requisition. This means that the goods or services have not and will not be ordered.

**Disapproved Sub Account** – The sub account reviewer disapproved the requisition. This means that the goods or services have not and will not be ordered.

**Disapproved - Separation of Duties** – The separation of duties reviewer disapproved the requisition. This means that the goods or services have not and will not be ordered.

**In Process** – The requisition has not been routed.