

## 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.

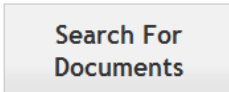
This guide details helpful search tips, and provides a brief overview of the most useful features available for each document type.

- [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.

Purchasing Accounts Payable			
Transactions			
	Create	Document Search	Help
Bulk Receiving	+		?
Contract Manager Assignment			?
Electronic Invoice Reject Document			?
Line Item Receiving	+		?
Payment Request			?
Purchase Order			?
Requisition	+		?
Vendor Credit Memo			?

**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.

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



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

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.

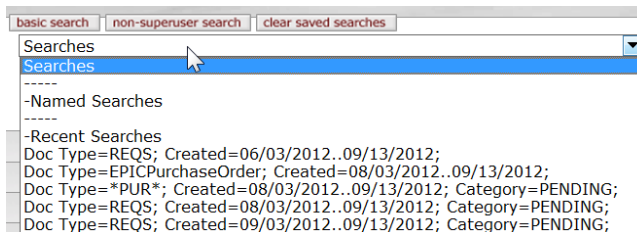
- When all known properties have been entered, click the **Search** button.

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

Document Id	Status	Document Description	Organization Document Number	Requisition #	Requisition Doc Status	Chart/Org	Suggested Vendor	Date Created	Ledger Document Type	Total Amount	Route Log
11051072	ENROUTE	kalagu - T-SHIRTS FOR STC STAFF		1152	Awaiting Content Approval	UA-VPIT	BAUON ENTERPRISES INC			1,185.83	<a href="#">Click on the Route Log for details</a>
11050622	ENROUTE	same test - dmb		1146	Awaiting Fiscal Officer	UA-PUR	TEST			9,147.96	
11050612	ENROUTE	same test - dmb	120398	1145	Awaiting Fiscal Officer	BL-OFF	QED TECHNOLOGIES			19,000.00	

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.

- 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.

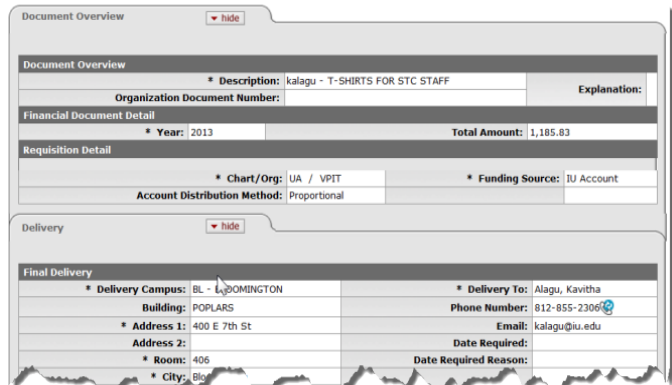
## VIEW PURCHASING DOCUMENTS

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

Document Id	Status	Document Description	Organization Document Number	Requisition #	Requisition Doc Status
11051112	FINAL	KULFDBCK-4525 Test		1153	Awaiting Contract Manager Assignment
11051072	ENROUTE	kalagu - T-SHIRTS FOR STC STAFF		1152	Awaiting Content Approval
11050963	FINAL	ACM test - dmb		1151	Awaiting Contract Manager Assignment
11050953	CANCELED	null document	null docum...		
11050906	PROCESSED	IE_CM_PO_REW_BY_UNT_AMT		1150	Closed

- To learn more about a document, click its document id link in the first column.

**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.

Posted Timestamp	Author	Note Text	Attached File	Notification Recipient	Actions
add:		Add a note here	Browse...		add
1 09/13/2012 10:53 AM	Burkhardt, Donna J	send to purchasing for approval			send

**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](mailto:purhelp@indiana.edu).

Notification Recipient	Actions
	add
djburkha Burkhardt, Donna J	send

7. Click **send** to send the email notification!!

**RESULT:** *The note is permanently saved to the document record.*

**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:

Method of PO Transmission	Requestor Name
Print	Burkhardt, Donna J
Fax	
No Print	

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.



## 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.