Requisition Exercise #1

This example demonstrates splitting a purchase of multiple assets between two accounts by amount.

Click Requisition from the Main Menu

Document Overview tab
1. Enter Description: Training

Delivery tab
Update delivery location as needed; Final Delivery information defaults to that of the document initiator
2. Leave information as-is for this exercise

Vendor tab
Vendor Address sub-tab:
3. Click magnifying glass next to the Suggested Vendor field
4. Vendor Name: Dell Marketing Corp, click search
   a. Helpful Hint: you can enter the first several letters of your vendor name and the % wildcard to get a list of vendors
5. Select return value for the vendor you are purchasing from, this will bring the vendor details in to your requisition document

Vendor Info and Additional Suggested Vendor Names sub-tabs are optional

Items tab
Enter information into the Items tab for each line item on your quote
6. Item Type: QUANTITY; Quantity: 2; UOM: EA; Description: Server; Unit Cost: 6,000 (enter cost of a single unit-th.e extended cost will be the quantity multiplied by the unit cost); click the add button
7. Item Type: NO QUANTITY; Description: Shipping; Unit Cost: 1,000; click the add button

<table>
<thead>
<tr>
<th>Item 1</th>
<th>QUANTITY</th>
<th>Description</th>
<th>Quantity</th>
<th>UOM</th>
<th>Unit Cost</th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Server</td>
<td>2</td>
<td>EA</td>
<td>6,000</td>
<td>12,000</td>
</tr>
</tbody>
</table>

Enter information into the Accounting Lines to set up accounts and amounts for each Item entered; in this example one department has agreed to pay for one server and the entire cost of shipping, and the other department will pay for the remaining server.
8. Click the show button on the Accounting Line for each Item
9. For Item 1 (two servers) - Chart: CO; Account Number: 1355410; Object: 8210; Amount: 6,000; click the add button
   a. Add another accounting line for the second department’s account - Chart: CO; Account Number: 1355400; Object: 8210; Amount: 6,000; click the add button
10. For Item 2 (shipping) - Chart: CO; Account Number: 1355410; Object: 8210; Amount: 1,000; click the add button

Capital Asset tab
Any time a capital asset object code is used in the Requisition document the Capital Asset tab must be completed; this will enable KFS to add all purchase information to the asset record when it is created.
11. Capital Asset System Type: One System
13. Click the select button on the Action line

System Detail sub-tab:
14. Capital Asset Note Text: Combine all lines to make two assets  
   a. Enter details about the Items within the document; designate which lines belong to which asset or system of assets.
15. Capital Asset System Description: Dell Server  
   a. Enter specific description/identification details of item(s)
16. Asset Type: 30255IS  
   a. Helpful Hint: use magnifying glass to lookup available codes
17. How Many Assets: 2  
   a. Enter number of assets to be created in total
18. Manufacturer: click same as vendor button
19. Model: DELL100X  
   a. Enter model number if available

**Location sub-tab:**
20. Item Quantity: 2  
   a. The Item Quantity should be 1 if each asset were going to be stored in different locations. In that case, continue to add a line for each location.
21. Building: click magnifying glass to lookup building codes; enter 0080 in the Building Code field; click search button; click return value on the retrieved building
22. Room: 318
23. Click the add button

![Capital Asset System Description](image)

**Capital Asset Items sub-tab:**
24. Capital Asset Transaction Type: New (for the servers)
25. Capital Asset Transaction Type: Other Service (for the shipping & handling)

![Capital Asset Items](image)

**Notes and Attachments tab**
Attach Quote and any additional details/notes needed to back up the requisition document.

26. Click the submit button when the Requisition document has been completed and is ready for routing. Message should indicate the document was successfully submitted. If an error message appears, correct issues as addressed or contact Property Management for assistance.

**Requisition Exercise #2**
This example demonstrates a purchase of replacement parts that significantly extend the useful life of an active asset (Modify Existing) and is distributed evenly to a single account.
Click Requisition from the Main Menu

**Document Overview tab**
1. Enter Description: Training

**Delivery tab**
Update delivery location as needed; Final Delivery information defaults to that of the document initiator
2. Leave information as-is for this exercise

**Vendor tab**

**Vendor Address sub-tab:**
3. Click magnifying glass next to the Suggested Vendor field
4. Vendor Name: Fisher Scientific Co, click search
   a. Helpful Hint: you can enter the first several letters of your vendor name and the * wildcard to get a list of vendors
5. Select return value for the vendor you are purchasing from, this will bring the vendor details in to your requisition document

**Vendor Info and Additional Suggested Vendor Names sub-tabs are optional**

**Items tab**
Enter information into the Items tab for each line item on your quote
6. Item Type: QUANTITY; Quantity: 1; UOM: EA; Description: Replacement Piece; Unit Cost: 4,000; click the add button

7. Click the show button next to Accounting Lines
Enter information into the Accounting Lines to set up accounts and amounts for each Item entered; in this example a replacement piece is being purchased that will significantly extend the life of a currently Active asset.
8. Chart: CO; Account Number: 5331370; Object: 8240; Percent: 100.00 (default value); click the add button

**Capital Asset tab**
Any time a capital asset object code is used in the Requisition document the Capital Asset tab must be completed; this will enable KFS to add all purchase information to the asset record when it is created.
9. Capital Asset System Type: Multiple Systems
10. Capital Asset System State: Modify Existing System
11. Click the select button on the Action line
   a. Helpful Hint: the screenshot below shows the buttons available after the select option is chosen; if anything needs to be changed in the Items or Accounting Lines after this selection has been made, then the user can click either the change or update view buttons.

**System Detail sub-tab:**
12. Add Asset Number: 505377; click add button
13. Capital Asset Note Text: Add replacement part to decal 323388

**Capital Asset Items sub-tab:**
14. Capital Asset Transaction Type: Modify Existing
Notes and Attachments tab
Attach Quote and any additional details/notes needed to back up the requisition document.

15. Click the submit button when the Requisition document has been completed and is ready for routing. Message should indicate the document was successfully submitted. If an error message appears, correct issues as addressed or contact Property Management for assistance.

Requisition Exercise #3
This example demonstrates splitting a purchase of multiple assets across multiple line items, between two accounts by percent.
Click Requisition from the Main Menu

Document Overview tab
1. Enter Description: Training

Delivery tab
Update delivery location as needed; Final Delivery information defaults to that of the document initiator
2. Leave information as-is for this exercise

Vendor tab
Vendor Address sub-tab:
3. Click magnifying glass next to the Suggested Vendor field
4. Vendor Name: Zunesis Inc, click search
5. Select return value for the vendor you are purchasing from, this will bring the vendor details in to your requisition document

Vendor Info and Additional Suggested Vendor Names sub-tabs are optional

Items tab
Enter information into the Items tab for each line item on your quote
6. Item Type: QUANTITY; Quantity: 2; UOM: EA; Description: HP BL460c Gen8 CTO Blade; Unit Cost: 1,756.28 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button
7. Item Type: QUANTITY; Quantity: 2; UOM: EA; Description: HP BL460c Gen8 E5 2640 FIO Kit; Unit Cost: 856.87 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button
8. Item Type: QUANTITY; Quantity: 2; UOM: EA; Description: HP BL460c Gen8 E5 2640 Kit; Unit Cost: 1,195.85 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button
9. Item Type: QUANTITY; Quantity: 32; UOM: EA; Description: HP 16GB 2Rx4 PC3-12800R-11 Kit; Unit Cost: 218.06 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button
10. Item Type: QUANTITY; Quantity: 4; UOM: EA; Description: HP 146GB 6G SAS 15K 2.5in SC Ent HDD; Unit Cost: 237.94 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button
11. Item Type: QUANTITY; Quantity: 4; UOM: EA; Description: HP 5y 4h 24x7 BL4xxc Svr Bld HW; Unit Cost: 1,217.67 (enter cost of a single unit- the extended cost will be the quantity multiplied by the unit cost); click the add button.

12. Click the setup distribution button
Enter information into the Accounting Lines to set up accounts and amounts for each Item entered; in this example two departments have agreed to pay for one-half the cost.
13. Chart: CO; Account Number: 1356580; Object: 8210; Percent: 50.00; click the add button
14. Chart: CO; Account Number: 1357420; Object: 8210; Percent: 50.00; click the add button
15. Click the distribute to items button
   a. This distributes the entire cost evenly between the two accounts.

Capital Asset tab
Any time a capital asset object code is used in the Requisition document the Capital Asset tab must be completed; this will enable KFS to add all purchase information to the asset record when it is created. In this example, all lines combine to create two assets, total cost for each asset is $10,290.18.
16. Capital Asset System Type: One System
17. Capital Asset System State: New System
18. Click the select button on the Action line

System Detail sub-tab:
19. Capital Asset Note Text: All lines combine to create two assets
   a. Enter details about the Items within the document; designate which lines belong to which asset or system of assets.
20. Capital Asset System Description: BladeServer System
   a. Enter specific description/identification details of item(s)
21. Asset Type: 30255IS
   a. Helpful Hint: use magnifying glass to lookup available codes
22. How Many Assets: 2
   a. Enter number of assets to be created in total
23. Manufacturer: click same as vendor button
24. Model: BL460C

**Location sub-tab:**
25. Item Quantity: 2
26. Building: click magnifying glass to lookup building codes; enter 0004 in the Building Code field; click **search** button; click **return value** on the retrieved building
27. Room: 100
28. Click the **add** button

**Capital Asset Items sub-tab:**
29. Capital Asset Transaction Type: NEW (for each Item Line#)

<table>
<thead>
<tr>
<th>Item Line #</th>
<th>Item Type</th>
<th>Quantity</th>
<th>UOM</th>
<th>Catalog #</th>
<th>Commodity Code</th>
<th>Description</th>
<th>Unit Cost</th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>2.00</td>
<td>EA</td>
<td></td>
<td>HP BL460c Gen8 CTO Blade</td>
<td>1756.28</td>
<td>3512.56</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>2.00</td>
<td>EA</td>
<td></td>
<td>HP BL460c Gen8 E5 2640 FIO Kit</td>
<td>855.87</td>
<td>1713.74</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>2.00</td>
<td>EA</td>
<td></td>
<td>HP BL460c Gen8 E5 2640 Kit</td>
<td>1195.85</td>
<td>2391.70</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>32.00</td>
<td>EA</td>
<td></td>
<td>HP 16GB 2Rx4 PC3-12800R-11 Kit</td>
<td>218.06</td>
<td>6977.92</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>4.00</td>
<td>EA</td>
<td></td>
<td>HP 146GB 6G SAS 15K 2.5in SC Ent HDD</td>
<td>237.94</td>
<td>951.76</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>4.00</td>
<td>EA</td>
<td></td>
<td>HP 5y 4h 24x7 BL460c Svr Bld HW Support</td>
<td>1217.67</td>
<td>4870.68</td>
<td></td>
</tr>
</tbody>
</table>

**Notes and Attachments tab**
Attach Quote and any additional details/notes needed to back up the requisition document.

30. Click the **submit** button when the Requisition document has been completed and is ready for routing. Message should indicate the document was successfully submitted. If an error message appears, correct issues as addressed or contact Property Management for assistance.