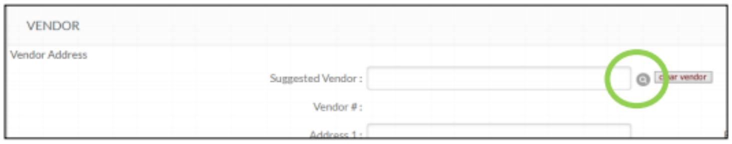
KUALI QUICK GUIDE

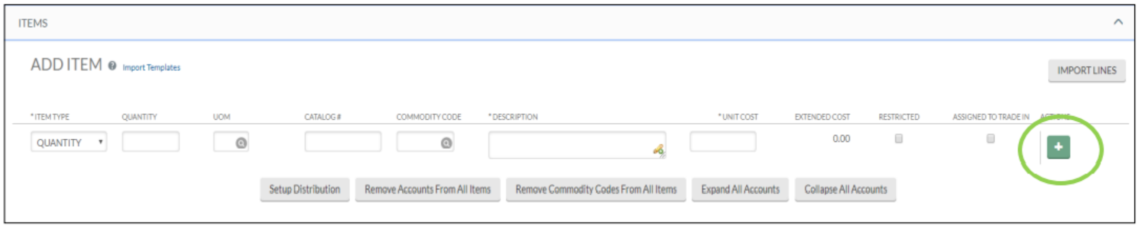
Getting Started

- Requisitions and Shop Catalogs are found in the “Procurement & Accounts Payable” tab in Kuali Financials
- **Delivery**: Our building number is **0041** and room is **AR124** (this is the Physics Office). Delivery instructions are internal so **the vendor will not** see information added here. If you have a note for the vendor, add it later in the notes section.
- **Vendor**: Click on the magnifying glass after “suggested vendor” field. When searching, use the asterisk (*) as a wildcard to help you find the vendor name. Click the **“return value”** link after you find the vendor to populate the vendor field. (If ordering via shop catalogs, this will already be filled in.)



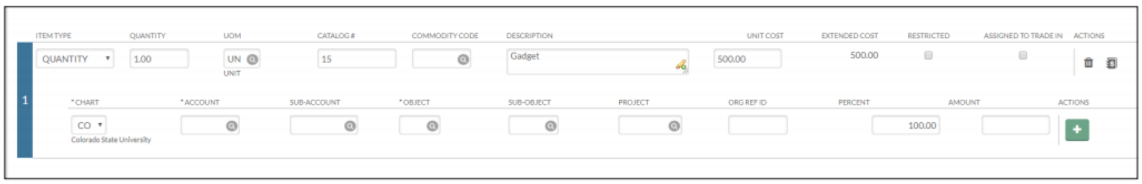
Items & Accounting Lines

- If creating a requisition (not a shop catalog purchase), you will have to add each line, according to the quote. If there is a field with an asterisk, you must enter information.
- “UN” and “EA” are the most frequently used “Unit of Measurement.” You can search for more options.
- Hit the “add” button, which looks like this: 



- Once you add the item(s), you will need to add accounting information by clicking on this icon:

- Enter the account number and object code. Make sure to “add” the info by clicking this button:

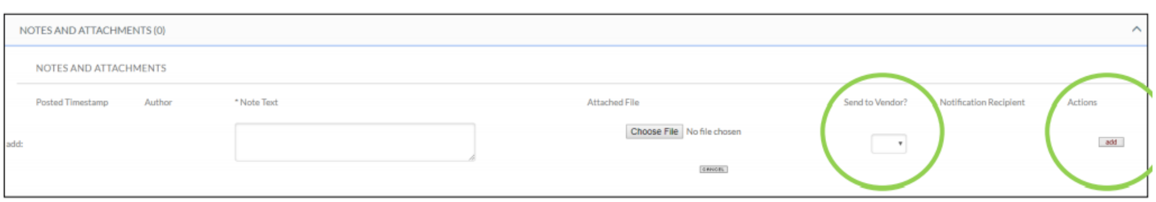


- **<u>Other Tips</u>**: Use “setup distribution” for the account info when you have a lot of line items to save time. Use the calculate button at the bottom of the screen to enter the “amount” on the accounting line(s) after you add the account info and object code.
- **<u>Common Object Codes</u>**:

6201	General Supplies
6225	Computer Hardware/Software
6601	General Services
6603	Printing and Copying Services
6624	Freight

Notes & Attachments

- Upload all documents relevant to the purchase, including the quote if a requisition.
- You may use the drop down to choose “YES” to send a note to the vendor, if necessary. Make sure to also click the “add” button.



- If you are ordering from AirGas you must include the account #, the lab #, and a phone number, and you must make sure to “send” that information to the vendor.
- Enter your purchasing justification in the notes section as well. All purchases on a 53, 88, or 64 account require a justification. It is recommended you provide this information on a 13 or 16 account.