KUPPS USER GUIDE INDEX

Catalog Goods
Cart-
- Punch-Out Shopping Options ................................................................. 4
- Hosted Shopping Options ................................................................. 6
- Editing a Shopping Cart ................................................................. 7
- Managing a Draft Cart ................................................................. 9
Requisition-
- Creating a Purchase Requisition .................................................. 11
- Editing a Draft Requisition .......................................................... 12
- Edit Accounting Chartfield Codes .................................................. 14
Approval-
- Approving a Requisition ............................................................. 16
- Email Approval for Requisitions .................................................. 18
- Approve E-Invoice Greater than $5000 ........................................... 20

Non-Catalog Goods
Cart-
- Non-Catalog Shopping Options ..................................................... 21
- Editing a Shopping Cart ............................................................... 24
- Managing a Draft Cart ............................................................... 26
Requisition-
- Creating a Purchase Requisition .................................................. 28
- Editing a Draft Requisition .......................................................... 29
- Edit Accounting Chartfield Codes .................................................. 31
Approval-
- Approving a Requisition ............................................................. 33
- Approving a WebNow Non-Catalog Invoice .................................. 35
- Email Approval for Requisitions .................................................. 37
- Approve E-Invoice Greater than $5000 ........................................... 39

CHECK REQUESTS

- Creating a Check Request .............................................................. 40
- Tracking a Check Request ............................................................ 43
- Creating a Refund Check Request .................................................. 44
- Approving a Check Request .......................................................... 45
- Editing a Draft Requisition ............................................................ 48

Index Page 2....
# Searching for Documents in KUPPS and WebNow

- Searching KUPPS Document History .................................................................................. 52
- Finding an E-Invoice ............................................................................................................. 55
- Finding a Check Request or Non-Catalog Invoice ............................................................... 56
- Searching WebNow .............................................................................................................. N/A
- Printing WebNow Invoice .................................................................................................. 59

# Overall P2P Process Maps

- Overall Process Map .......................................................................................................... 60
- Catalog Process Map .......................................................................................................... 61
- Non-Catalog Process Map .................................................................................................. 62
- Check Request Process Map .............................................................................................. 63
- Refund Request Process Map ............................................................................................. 64

# Other

- Change Order Requests-
  - When to Submit PO Change Order Requests ................................................................... 65
  - How to Submit PO Change Order Requests ..................................................................... 66
- Reviewing Contracts ........................................................................................................... 69
- Changing Notification Settings .......................................................................................... 72
- Tutorial on DEMIS PO Activity Reports ............................................................................. 73
- Locating DEMIS PO Activity Reports ................................................................................ 90
- Requesting Access to KUPPS ............................................................................................... 92
- Technical Problems When Using KUPPS ............................................................................ 93
Login To KUPPS Using the myKU Portal

KUPPS identifies users by their myKU portal username and password. No additional username or password is required after authenticating through the KU portal.

All KUPPS users must be approved by their respective department heads and should receive training before using the system.

1 **Accessing the myKU Portal.** Click the myKU portal link on any KU webpage. At the prompt, enter your University Online ID and Password. These are typically the same ID and Password used for University email.

2 **KUPPS Login.** Once in the myKU portal, scroll down until the Services section of the navigation pane is visible on the left side of the screen and select **KUPPS Login**.

3 **Login Authentication: Step 1.** Click the **Click here to request authorization for KUPPS** link.

4 **Login Authentication: Step 2.** Click the **Click here to visit KUPPS as an authorized user** link. This launches KUPPS into a new browser window or tab. You may close the browser for the myKU portal.
1 **User Information.** In the upper left corner, information about the user is displayed within the upper menu bar. By clicking on your username you can access your user profile, set your home page, or logout.

2 **Active Cart Summary.** The upper right corner displays a summary of the active shopping cart. Included is the cart name, the number of items in the cart, and the total dollar amount in the cart. Click this shortcut to go directly to the cart page where the draft requisition details can be reviewed and updated.

3 **Quick Search.** This feature allows a variety of searches to be executed from anywhere in the application. To use this feature, a search option must be selected and search criteria must be keyed in. Clicking the button executes the quick search and displays the results in the appropriate search results screen.

4 **Screen Title.** In the application header, just below the user information box, the title of the current screen displays.

5 **Navigation tabs.** Across the left side of the application are navigation tabs granted to individual users. By hovering over the button your selection will expand to show the subtopics under the button selected.

   *home* – takes the user to the homepage. The default homepage is the shopping page. See 1 to change your homepage. From the admin home screen, a wide variety of admin links are available for selection, including shortcuts to catalog management, user management, and field management.

   *shop* – is used to manage your carts and orders. You may also go to advanced search, view favorites, view forms, non-catalog form, or place a quick order. In addition you can browse by suppliers, categories, contracts, or chemicals.

   *orders and documents* – contains a repository of various documents within the application. Purchase requisitions, purchase orders, receipts, invoices, and fulfillment orders are all available for viewing, depending on the permissions granted and it allows the user to search for specific documents. In addition you can access approvals through this menu button.

   *catalogs and contracts* – allows the user to search for, manage, and view details of vendor contracts and manage consortium settings.

   *accounts payable* – is used to view the accounts payable dashboard, search for and view invoices, and view early payment analysis and early payment discount details reports.

   *reporting* – contains operational and site usage reports, purchases and spending reports, and allows the user to download report export and extract files.
site administration – contains the administration dashboard and allows users to search for other users, search for and create a new supplier, manage shopping settings, and view import and export results.

site configuration – contains hosted catalog and ordering configuration, site appearance and behavior, and user communication.

6 Shop Search Options. Use the quick search Shop to perform keyword searches on the KUPPS hosted catalogs. The default search will search across Everything - all categories for which hosted catalogs are available. To narrow the search, choose a specific category before entering a keyword. For best results, enter at least four characters the keyword search.

7 Quick Links. These links also found within the Navigation tabs. These links are put on the KUPPS homepage because they provide easy access to the most commonly used site features. Go to links navigate to user favorites, forms, and quick order shopping. The browse links navigate to Supplier search tool, categories of commodities and services, the contract search tool, and the chemical structure search tool.

8 Online Help. Online Help is accessed by clicking on the icon found anywhere in the application. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays.

9 Catalog (Punch-out) Vendors. These vendor links allows users to directly search and select products for purchase and return them to the shopping cart in KUPPS. Note, a punch-out marked with a yellow triangle in a circle is currently running slowly. A punch-out button marked with a indicates the supplier site is not currently available.

10 Hosted Catalog Vendors. These buttons open catalogs within KUPPS for the applicable supplier. Using the search navigation options, system users can locate and load items into the active KUPPS shopping cart.

11 Forms. These buttons open forms used for purchases requiring specialized detail and/or approvals: 1. Non-Catalog Goods; 2. Non-Catalog Services; 3. Check Request.
User Guides on Placing Orders

Using the KUPPS System:

- Catalog Goods
- Non-Catalog Goods
User Guides for Catalog Orders

- Carts
- Requisitions
- Approvals
Shopping Cart User Guides for
Catalog Goods Orders:

- Punch-Out Shopping Options
- Hosted Shopping Options
- Editing a Shopping Cart
- Managing a Draft Cart
From the KUPPS homepage, click on the applicable vendor icon from the Punch-out region of the page (Staples is illustrated here.)

1 User Recognition. There is no separate login process for punch-out shopping within KUPPS. When the punch-out supplier site opens, the initial page will display a message that recognizes the KU shopper.

2 KUPPS Punch-out banner. Each punch-out supplier site provides a KUPPS Punch-out banner identifying the shopping session as part of KUPPS.

Click the **Reset Session** button if the SciQuest Session approaches 00:00. If the session expires, you will be unable to bring the supplier goods into the KUPPS shopping cart. Clicking this button will not alter the current punch-out shopping session with the supplier.

To immediately exit the punch-out site, click the **Cancel Punch-out** button to end the shopping session and return to the KUPPS homepage. Unsaved data on the punch-out site may be lost.

Miscellaneous

Each punch-out site provides a slightly different shopping experience. Each punch-out supplier provides intuitive links/tools to locate and select their products.

**Note** – When using Internet Explorer (IE), allow the site to **Show all content** and load both secure and unsecure content. Catalog suppliers provide trusted sites. If a page will not load correctly in IE, sign out and reopen in Mozilla Firefox.

All items in punch-out catalogs are under contract. Core list items get special discount pricing. Some items require prior authorization to purchase.

**Do NOT purchase items that violate KU purchasing policies.**

Most suppliers provide a “favorites” feature that allows shoppers to create customized lists of products that they frequently purchase. Adding items to one’s “favorites” list will save time during future shopping trips for the same items.

Product availability may be demonstrated on each site. If an item is available, many sites will report how many items are in stock.
**Supplier Shopping Cart.** Each punch-out supplier has a shopping cart and checkout process. Suppliers’ shopping carts provide details of the order and can be edited before checking out.

**Checkout or Submit Punch-out Order.** Once a punch-out supplier shopping cart is complete, KU shoppers can check out. Click the available submit/checkout button(s) and the order will automatically load into the KUPPS Cart.

If additional items are needed, return to the punch-out site and continue shopping. After checking out, the new items will load into the active draft shopping cart.

**Note** – Staples requires a minimum order of $35. Sigma Aldrich will charge additional shipping/handling fees for orders under $200.

Orders for hazardous materials will automatically download KU EH&S details into the KUPPS shopping cart. There is a separate workflow approval process for certain hazardous items purchased by the University.

**NOTE** – Shopping through punch-out suppliers should be fast and convenient. Please report difficult or irregular shopping experiences to the KUPPS Help Desk. Questions about payments, funding and other audit requirements can also be made to the P2P Help Desk. KUPPS@ku.edu 785-864-3098 / 785-864-6136.
Hosted Catalogs are vendor catalogs maintained within KUPPS. These catalogs typically do not carry the full range of products found in a punch-out catalog, but contain contractually priced items.

Take the following steps to create a hosted catalog shopping cart:

1. **Select Supplier.** From the KUPPS homepage, click on the applicable vendor icon from the list of Hosted Catalog Suppliers. (Stanion Electric is illustrated here.) This opens the initial search tool.

2. **Initial Search.** To open the entire supplier catalog, click on the button without entering search criteria. Basic search criteria can be used here, but it may produce undesired search results.

3. **Search the Catalog.** After the hosted catalog opens, KUPPS provides dynamic filters to refine the search results. Filter options include:
   - Add Keywords (click Go)
   - By Category (product categories)
   - By Packaging UOM (Units of Measure)
   - By Result Type (Products, Services, etc.)
   - By Manufacturer

4. **Add to Items Cart.** After locating the item(s), type in the desired quantity and click . A message will appear confirming the items have been added to the KUPPS cart - draft requisition.

After adding all items from the hosted catalog, go to the draft cart by clicking on either the view cart link within the hosted catalog or the active cart link in the top right hand corner of the page.

5. **Review Cart.** After adding items to the cart, review and edit the shopping cart as applicable. Return to the hosted catalog if additional items are needed.
When a punch-out shopping session is returned or a KUPPS form is saved, that information is placed into the Shopping Cart of a draft purchase requisition (PR). These instructions describe the editing options of the KUPPS Shopping Cart page.

1. **Open Draft Cart.** Click the shopping cart icon to open the active cart. If no active draft cart exists, the draft carts page will state –
   - ![You do not have an active cart selected. Please create a new cart.](image)
To **create a new cart**, either return a punch-out catalog order or complete a form to create a non-catalog / check request draft PR.

2. **Doing Business as:** Each KUPPS PR must be associated with either The KU Center for Research, Inc., or The University of Kansas. The option selected must agree with the Business Unit selected in the Accounting Codes of the draft PR.

3. **Cart Name and Description.** Each KUPPS cart is automatically assigned a unique Cart Name based on the user name and the date created. There is no central requirement to rename the cart. The Description field is initially blank and can be used to provide additional details to administer and track the transaction.

4. **Priority and Shopper.** Changing the priority status from normal to urgent does NOT expedite the PR – it only puts an "urgent" flag on the PR for the workflow Approver (suppliers do NOT see the Urgent flag.) Do NOT change the Shopper identity. This change requires exceptional circumstances. Altering the Shopper identity can create downstream workflow problems.

5. **For Selected Line Items.** This drop-down menu provides the following options to edit items in the cart:
   - ![Add To Favorites](image) – Copy selected item(s) to Favorites folder(s).
   - ![Remove Selected Items](image) – delete selected items from the cart.
   - ![Remove All Items](image) – delete all items from the cart.
   - ![Move to Another Cart](image) – move selected items to another cart.
   - ![Change Supplier](image) – change the listed supplier for a non-catalog item.
   - ![Add to Draft Cart or Pending PR/PO](image) – move the selected items(s) to an existing draft cart or one already advanced in the workflow.
   - ![Check applicable lines in the cart and click the Go button.](image) Follow the instructions in the pop-up windows that follow.

6. **Product Description.** Items currently in the shopping cart are identified, including a summary of the line items. Some punch-out suppliers allow changes to quantity in the KUPPS Shopping Cart while other suppliers do NOT allow quantity changes here.
KUPPS Shopping Cart Editing Options

Form (Non-Catalog) Supplier / Line Item Details Edit Options

7 Edit Non-Catalog Form. To add or edit items entered into the Shopping Cart from a SciQuest form:
1. Click more info… under Product Description to open the form.
2. Edit the form as necessary.
3. Save changes and return to the Shopping Cart.

8 Change / View Contract Status. Changes can be made to the contract status of a transaction in the form and in the draft shopping cart. To view or edit the contract status of a line item:
1. Click on the Select price or contract… link.
2. The Price and Contract pop-up window opens. Click on the applicable radio button to change the contract status if necessary.
3. Click on the OK button to save the change.

Once all Shopping Cart edits have been made:
Shoppers can click on the Assign Cart button to directly assign the cart to an applicable Requestor.
Requestors can either assign the cart to another Requestor or click on the Review Requisition button to continue editing the draft requisition detail.
KUPPS uses “shopping carts” to build purchase requisitions (PR) that are entered into the workflow. Shopping carts are draft PR’s and KUPPS allows users to have concurrent draft carts. Users can have multiple draft carts, but can only make changes to one cart at a time – the active cart.

1 Active Cart Status. In the top right corner of KUPPS page, the active cart tool shows the name of the active cart. In this illustration, there is no active cart.

2 Create and Select Active Cart options. When there is no active KUPPS cart, the act of checking-out with a punch-out supplier will automatically create a cart. If an active cart exists, checking-out with a punch-out supplier will put the items into the active cart. To review the draft cart summary, click Carts >> Draft Carts. Options include:

A. Create a new draft cart:
   1. Click . This also opens the new (empty) cart.
   2. Edit the Cart Name and Description as needed and save.
   3. To fill the empty cart, click on Continue Shopping.

B. Open an active cart – either click the active cart tool (top right) or the Shopping Cart Name from the draft carts page.

C. To select a different active cart, click on the Active Cart icon.

D. Click to delete a draft cart. Once deleted, a draft cart cannot be recovered. However, once submitted for approval, a PR record exists forever, even if rejected or withdrawn.
Add Items to Cart. To add items to an existing cart click Continue Shopping and select a punch-out supplier from the KUPPS homepage. Continue shopping from the punch-out supplier and then check-out to add to cart.

Cart Content Administration. When KUPPS users want to move items from a cart to a favorites folder, or different cart, or remove items altogether:
1. Open the applicable cart from the draft cart list.
2. Under the Supplier / Line Item Details, click-on the selection check box for each applicable order line.
3. Click the For selected line items drop-down menu, and select one of the following options:
   - Add To Favorites
   - Rename Selected Items
   - Remove All Items
   - Move to Another Cart
   - Add to Draft Cart or Pending PR/PO
   - Add to PO Revision
   If moving the selected item to a new location, navigate through the options to either remove or relocate the selected items.
4. Click Go to complete the action.

Verify Contract Status. For non-catalog orders, ensure the cart correctly identifies the cart as either a contract or no contract transaction.
1. Click Select price or contract...
2. Verify the correct contract status is selected.
3. Click OK to set the contract status.
Requisition User Guides for Catalog Goods Orders:

• Creating a Purchase Requisition
• Editing a Draft Requisition
• Editing Accounting Chartfield Codes
Steps for Creating a Purchase Order in KUPPS

1. Login to KUPPS.

2. Ensure that either no cart or the correct cart is the active cart. Top right of page should look like this: ![0.00 USD](image)

3. From the KUPPS homepage, begin shopping by using one of the following methods:
   A. Punch-out Supplier – Click on the icon of the applicable punch-out supplier to begin punch-out shopping;
   B. Hosted Catalog Supplier – Click on one of the supplier icons, use the search tools, and add items to the draft cart; – OR –
   C. Click on either the **Non-Catalog Goods Form** or **Non-Catalog Services Form** button. Enter all shopping detail into the form and save.

4. Bring the completed shopping cart back into the KUPPS Shopping Cart.

5. Edit the KUPPS shopping cart as necessary. To add line items, return to the catalog or reopen the **Non-Catalog Form** and add items.

6. Once the content of the shopping cart is satisfactory, click the **Review Requisition** button. For Shopper staff whose role is to only shop, click the **Assign Cart** button and assign the cart to the appropriate Requestor.

7. After opening the **Summary – Draft Requisition** page, edit/complete the following fields:
   - **General** – Doing Business as: Select either The University of Kansas – or – KU Center for Research, Inc.
   - **Shipping** – Verify/edit the details of the shipping location.
   - **Billing** – Verify/edit the details of the billing location. *Note* – catalog e-invoices are sent back to KUPPS; non-catalog invoices (paper or PDF) are sent to the KU Accounts Payable office for scanning and indexing into the KU ImageNow application.
   - **Accounting Codes** – Shoppers do NOT need to populate these codes before assigning to cart. Requestors submitting the cart for approval must complete this information. Approvers are authorized edit the accounting codes before approval. Click the **View/edit by line item…** link to enter code values by line item or to split funding by dollar amount.
   - **Internal Notes and Attachments** – Type a short summary of the reason or justification for the order. The note typed here becomes the “Comment From External PO” in FKSU payment records. Attach any file that may be necessary or useful for approval or audit.
   - **Supplier / Line Item Details** – Add notes/attachments here as necessary.

8. Once the draft requisition is satisfactory, click the **Submit Requisition for Approval** button.

A cart submitted for approval is now a Purchase Requisition (PR) in a KUPPS approval folder. Any Approver for that department or project can open the applicable approval folder and approve or reject the PR. Once approved, a purchase order (PO) is sent to the supplier and a PO is created in FSKU to encumber the transaction for DEMIS reporting.

- Catalog (punch-out) suppliers are sent electronic PO's; e-invoices return to KUPPS automatically creating PO vouchers in FSKU.
- Non-catalog suppliers are faxed/emailed PO's; suppliers return paper/PDF invoices that workflow through ImageNow creating PO vouchers in FSKU.
The KUPPS Summary Draft Requisition is used to identify, classify, and correctly workflow procurement and check request transactions. To access the Draft Requisition:

A. Shopper/Requestor – Click [button] from the draft cart.
B. Approver – Open the PR using the applicable requisition number.

1 General. Click the [edit] button to update:

- **Doing Business as**: Associate the KUPPS PR with either The KU Center for Research, Inc., or The University of Kansas. This option must agree with the Business Unit in the Accounting Codes.
- **Cart Name**: Each KUPPS cart is automatically assigned a unique Cart Name based on the user name and date created. There is no central requirement to rename the cart.
- **Description**: This field is initially blank and can be used to provide additional details to administer and track the transaction.
- **Priority**: Puts an “urgent” flag on the PR for the workflow Approver.
- **Shopper / Requestor (identity)**: Do NOT change the identity. This change requires exceptional circumstances.

2 Shipping. See **Shipping/Billing Address Options** on page 2 for the Ship To edit options. Do not edit Delivery Options – it is set for contractual shipping agreements by supplier.

3 Billing. The default address is the KU Accounts Payable office. Non-catalog suppliers should send all manual invoices to this address. **Note** – forward misrouted invoices to APInbox@ku.edu. Do NOT change the Accounting Date.

4 Accounting Codes. Shoppers are not required to enter codes here. Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

- Click [edit] to update the accounting code chartfields.
- To add Header splits, click [add split] found on the far top right corner of the Accounting Codes tool.
- Click [view/edit by line item…] to edit codes by individual line items. Click [here] for detailed instructions on how to split by line item, dollar amount, or quantity.

5 Internal Notes and Attachments. Internal notes and attachments are for KU records. Click [edit] to enter information relevant to the objective/compliance of the transaction. Internal Notes transfer to PeopleSoft as voucher comments from External PO.

6 External Notes and Attachments. This information is sent to non-catalog suppliers along with the purchase order. Enter details or attach files that are pertinent to process the PO (i.e., quote document or special shipping instructions.) Click [edit] to enter external notes. Click [add attachment…] to attach a document file for the supplier (pdf, doc, xls). Ensure the file print format fits within 8½x11".
Shipping Address Options

KUPPS Shipping addresses include all buildings on the main KU campus, the Edwards campus, and other KU locations. System users can create default addresses that will automatically populate new requisitions.

To update an address, click the **Ship To** button in the requisition:

1. In the **Nickname / Address Text** field, type either:
   A. The name of the applicable building; or
   B. The street name in the **Address Text** field.
   Click **Search**.

2. Identify the correct location/address from the search results and click the applicable **Use** button.

3. From the **Selected Address Details**, type in the following information:
   - **Attn:** Name of person receiving the order.
   - **Room:** Location in building for delivery.
   - **Dept:** University unit receiving the delivery.
   If this address will not be used in future requisitions, click **Use** to enter this address for the current requisition.

4. If this address will be used in future requisitions, perform these additional actions:
   - Click the “Save this address for future use” checkbox.
   - Name the address in the open text field.
   - Click the “Check this box to make this the default address” checkbox.
   Click **Use**.
   This address will now automatically populate future requisitions created by the KUPPS user.

5. The address populates the requisition. Verify the details are correct. This address can be changed by anyone downstream in the workflow.

**Note** – In most cases, off-campus shipping locations will not be added to KUPPS. However, accommodations can be made for exceptional circumstances related to cost and critical timing. Contact the Helpdesk with special requests for shipping address updates.
Accounting Codes in KUPPS – Header vs. Line Level

Accounting chartfield codes entered into KUPPS transfer to the KU PeopleSoft Financial System (FSKU) and then DEMIS reporting. KUPPS users enter this detail during the creation and review of the requisition. Accounting codes are entered at either the Header or Line level. To determine which option to use:

Use **Header Level Entry** when:
- All line item funding splits are the same; and
- All funding splits will be done by percentage (%) only

Use **Line Level Entry** when:
- There is any variance between line item funding splits; or
- Funding splits are made by:
  a. dollar amount ($); or
  b. quantity within a line item

Enter / Edit Accounting Chartfields in a KUPPS Requisition

1. **Header Level Entry.** Scroll down to the Accounting Codes section and click the edit button. This launches the Accounting Codes pop-up window at the Header level.

   1. Manually type or use the Select from* tools to enter the applicable chartfield values in each field:
      - Business Unit (either UKANS or KURES)
      - Speed Chart (auto-fills Business Unit, Fund, Department, and Project numbers in fields. When not used, leave as NONE – this field cannot be left blank)
      - Account
      - Fund
      - Department (must not conflict with Business Unit)
      - Project (this field is populated by using the Speed Chart)
      - Budget Reference (year)
      - Chartfield1 (as applicable by department)
      - KUEA Account (Used only with Fund 725)
      - KURES Project Reimbursable (Used only with Fund 720)
      - KURES Department Reimbursable (Used only with Fund 721)

   2. When the cart must be split between different accounting chartfield codes, click the add split link in the top right of the Accounting Codes edit tool. This creates a new accounting chartfield line that may be split by % only. Update the applicable codes in the new line(s). Add more splits as required.

   3. Edit the chartfields as applicable.

   4. Click **Save**.

   **NOTE** – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.
**Line Level Entry.** Accounting codes must be entered or edited at the line item level instead of the header level when:
- There is variance between line item funding splits; or
- Funding splits must be by: a) dollar amount ($); or b) quantity.

To split funding at the Line Item Level:
1. Click on the Accounting Codes tab (or View/edit by line item… link in the Accounting Codes section of the Requisition Summary.) The requisition view changes from Summary to Accounting Codes.
2. In the Supplier / Product Description section, click the button of the applicable line item. This launches the Accounting Codes editing tool for the selected line.
3. Manually type or use the Select from tools to enter the applicable chartfield values (See step 1.1 list for field list detail.)
4. To split a specific line item, click the add split link in the top right of the Accounting Codes pop-up window. This creates a new accounting chartfield line. Options to split the line item include:
   - A. % of Price;
   - B. Amount of Price; or
   - C. Amount of Quantity
   (NOTE – splits at the header level only offer option A)
5. Add more splits are necessary.
6. Edit the applicable accounting codes in the new line(s).
7. Click **Save**.

When lines vary from codes entered at the header level, the line will denote –

When lines match codes entered at the header level, the line will denote –

**NOTE** – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

**Select from** tools allow users to **Search** for and **select** codes by either numeric Values or alpha character Descriptions. Use the asterisk (*) as a wildcard to search for values within a known range.

**Example** – 137* in the Value field returns all codes starting with 137. “Office Supplies” in the Description field returns all codes with that phrase.
Guides on How to Approve Catalog Goods Orders:

- Approving a Requisition
- Email Approval for Requisitions
- Approve E-Invoice Greater than 5000
To approve KUPPS requisitions, first sign in to the myKU portal. The myKU portal link is located at the top right hand corner of the ku.edu homepage. The KU portal username and password is typically the same as the user's university e-mail username and password.

1. **Approvals.** Once logged in, click the Approvals tab to access all the options available for viewing, editing, and approving Purchase Requisitions (PR) waiting for approval.

2. **Review / Identify Pending Requisitions.**
   
   KU Approvers are often authorized to approve requisitions for multiple workflow rules. Requisitions needing approval are organized in workflow approval folders that function much like Window Explorer folders. However, requisitions pending approval can also be displayed in a List format. Steps:
   
   2.1 Select the Folder or List view option using the Group Results By: dropdown tool.
   
   2.2 Locate the applicable Approval folder and click on the expansion arrow tool to open the folder and view the summary of requisitions awaiting approval in that folder.
   
   2.3 Click the Show requisition details / expand all / collapse all options as needed to organize the pending requisitions.

3. **Assign the Purchase Requisition.**
   
   Click the button of the PR. This moves the PR to the My PR Approvals folder. Once an Approver assigns a PR to the My PR Approvals folder, no other Approver can edit or approve that requisition. But, a PR can be returned to the shared approval folder for another Approver to act on.

   **Note** – Pending requisitions can be approved but cannot be edited unless the requisition is assigned to an Approver.

4. **Approval Filter Options.**
   
   Filters allow Approvers to quickly view a limited selection of folders and/or requisitions. This is helpful when an Approver has many requisitions / workflows to review. The filters are dynamic and are easily changed as necessary.

   To open a particular filter option, click the add filter icon.

5. **Open PR for Review.**
   
   Click on the Requisition number (12345678) to open the requisition document for review. Either link to the Requisition Number will open the requisition document.

   To return to the Approvals page summary, click the Approvals tab from any page in KUPPS.
6 Correct Missing or Erroneous Detail. After opening an assigned requisition, any required information that is missing will be highlighted in yellow. Once all missing detail is entered, the requisition can be approved.

7 Approve or Reject (or other options for) the PR. From the Available Actions: drop-down list, take one of the following actions:

A. Approve/Complete Step – Approve the pending PR to send a PO to the supplier or send the PR to a central workflow approver.

B. Return to Shared Folder – Returns PR to department approval folder for another Approver to review and approve/reject.

C. Place PR on Hold – Puts PR in a temporary hold status.

D. Add Comment – Add a comment that can be sent to a KUPPS user in an e-mail.

E. Copy to a New Cart – Copy details into a new cart for use later.

F. Reject Requisition – Approver terminates PR without creating PO for supplier.

After selecting the desired action, click the Go button to complete the selected option (A-F).

8 Edit Line Item Details – Optional. Some suppliers allow KUPPS Approvers to reject one or more line items from a PR while other suppliers do not allow this type of editing. This option is turned off for suppliers that do not allow this type of Approver editing.

To edit line items before approval:
1. Navigate to Supplier/Line Item Details section of the PR.
2. Click the empty checkbox next to the line item(s) to reject.
3. Select Reject Selected Items from the dropdown menu.
4. Click the Go button.
5. Add the required comment to document the reason for rejecting the selected line item(s).

After deleting the undesired line items, click Approve/Complete Step (as shown in 7) to approve the remaining requisition after editing line item detail.
KUPPS Approvers can approve Requisitions through email notification without logging directly into KUPPS. These instructions are for approving KUPPS requisitions (PR’s) directly through the email notification.

**NOTE** – Email notifications provide significant detail about each PR, but may not fully illustrate complex accounting code split details. Approvers are responsible for the accurate assignment of chartfield detail. Open the requisition in KUPPS if you are unsure about the information provided in the email notice.

### Approve a PR through the Email Notification

1. **Review New Pending Approval for Requisition Email.**
   Open the New Pending Approval email for the applicable PR. Review the details of the PR.

2. **Take Action.**
   If there is enough information in the email notice to make a decision, click the **Take Action** button.

   - or -

   If there is not enough information in the email notice, click the [Click here to view the document in your organization’s site](#) link. This will prompt a login to KUPPS to review the PR in greater detail. See [Approving A Requisition](#) for additional information on this action.
3 **Select Action.** A new web browser window will open with the following actions to select from:
- Approve – Completes the approval of the PR.
- Assign to myself – Prevents other Approvers authorized to approve the PR from having access to approve or reject. This action does not approve the PR, but allows the Approver to edit the PR within the KUPPS application.
- Reject – Terminates the PR so that it may no longer be used.
- Return to Requisitioner – Notifies the requisitioner to take corrective active on the PR and resubmit for approval. It does not terminate the PR – it pushes it back within the workflow.

Comment – Type a comment if applicable to the transaction.

Click the **Submit** button to submit the action selected.

4 **Confirm Action.** Click the **OK** button to confirm the action.

The outcome will be tracked in the History of the PR document. The entry will record that it was approved via email.

“Requisition approved (via email)”
Catalog suppliers return electronic invoices (e-invoices) to KUPPS at the time of shipment. In the P2P environment, invoices result in voucher payments in the KU Financial System (FSKU). However, e-invoices greater than $5000 require approval in KUPPS before creating approved PO Vouchers in FSKU.

1 Approvals. Once logged into KUPPS, click the approvals tab to access all the options available for viewing, editing, and approving invoices awaiting approval.

2 Identify / Open Pending Invoice(s).
Under Refine Search Results, ensure the approval Type is for Invoice. Allow the filter to return only invoices. Click on the Voucher No. (S0000123) to open the invoice document for review.

3 Review Pending Invoice and Approve.
Once the invoice document displays, review each section as necessary and the approve the invoice.

3.1 Accounting Codes review.
3.2 Line Item Detail – Product Descriptions review. Compare to PO to determine if the invoice is a whole or partial invoice of the PO.
3.3 Invoice approval does not require an Approver to first Assign the invoice. Approvers can select Assign/Complete step and click Go to approve an invoice. Additional options are available if an approver chooses to assign an invoice.

After the invoice is approved, an approved PO Voucher is created in FSKU to pay for the invoice.

* Do NOT Reject an Invoice unless absolutely certain the invoice will never be used to create a PO voucher. Once rejected, the KUPPS invoice document can no longer be used to create a voucher in FSKU.
User Guides for Non-Catalog Orders

- Carts
- Requisitions
- Approvals
KUPPS

Shopping Cart User Guides for Non-Catalog Goods Orders:

• Non-Catalog Shopping Options
• Editing a Shopping Cart
• Managing a Draft Cart
The non-catalog purchase requisition (PR) forms are used to:

A. Purchase Goods from suppliers
B. Purchase Services from suppliers
C. Submit Competitive bid requests for goods, services or new purchasing contracts to the KU central office
D. Submit Bid Exception (prior authorization) requests to the KU central office when an order is over $5000 and no purchasing contract exists

These instructions are for completing the Non-Catalog forms. See Draft Requisition Editing Options for additional information on submitting a PR for approval.

Create a Non-Catalog Purchase Requisition

1. Select/Open The Non-Catalog Form. From the KUPPS homepage, click either the Non-Catalog Goods or Non-Catalog Services form. This action will directly open either the selected non-catalog form.

Alternate Method to Open a Non-Catalog Form

1. Open The Forms Page. From any KUPPS page, click the forms tool bar.
2. Select the Applicable Form. In the left column, expand the options under Shared (click on the + button). In the right column, click on the applicable form for either Goods or Services.

Goods and Services are entered into different forms because of distinctly different business processes that occur downstream in the workflow during the invoice and payment portion of the P2P workflow.

See page 2 for completing the Non-catalog Goods form.

See page 3 for completing the Non-catalog Services form. Use this form when goods are purchased in conjunction with a service (ex. Carpet and Installation.)
Example of Non-Catalog Supplier with a Contract

Non-Catalog Goods Form

3 Step 1: Supplier Information. Pick either option:

A. Manually type in the supplier name. KUPPS will automatically identify the supplier based on the name typed into the field.

B. Click the supplier search link and search the full list of suppliers in KUPPS to locate the correct one. Once the applicable supplier is located, click the Select link. This automatically enters supplier detail into the order form.

If the supplier needs to change, click the select different supplier link and use either option A or B.

Competitive Bid Request: Enter supplier name SUPPLIER UNKNOWN

4 Select Correct Contract Status. Click the select contract... link. Click on the applicable radio button to identify the correct contract status for the order – click OK. See example. If no contract exists for the supplier, no contract option will be available.

5 PO Distribution. Check this box if the PO needs to go to an alternate location (the PR will workflow to a central office for update.)

6 Step 2: Item Information. For each item ordered.
1. Catalog No. – Supplier provided product identification.
2. Product Description – A brief explanation of the item(s). Click the expand link as helpful to see the full text.
3. Quantity – Number of units in the order – must be greater than 0.
4. Unit of Measure – Use numbers and
5. Unit Price – Use numbers and decimal only – no alpha or symbols.

7 Step 3: Special Approval. Required Field - select the applicable option if the order requires Special Approval.

8 Step 4: Competitive Bid Exception Information. This section must be completed only when the PR is over $5K, there is no supplier contract, and pursuing a competitive bid is not applicable:
1. Exception Type – Select from either: Emergency; Off-Contract; or Sole Source.
2. Exception Justification... – A brief summary explaining why the PR should not go out for competitive bid.
3. Previous Order – Documentation of prior PO granted the same competitive bid exception.
4. Internal Attachments – Use this link to attach all documents relevant to the bid exception request.

9 Save to Cart. Using the drop-down tool, select an option to move item(s) in form to the shopping cart / draft requisition:
A. Add and go to Cart – moves item to cart, closes the form.
B. Add to Cart and Return – moves item to cart, keeps form open, clears Item Information.
C. Add to Cart – moves item to cart, keeps form open, retains Item Information.

Click and enter new line items.
Non-Catalog Services Form

3 Step 1: Supplier Information. Pick either option:
A. Manually type in the supplier name. KUPPS will automatically identify the supplier based on the name typed into the field.
– or –
B. Click the supplier search link and search the full list of suppliers in KUPPS to locate the correct one. Once the applicable supplier is located, click the Select link. This automatically enters supplier detail into the order form.

If the supplier needs to change, click the select different supplier link and use either option A or B:

Competitive Bid Request: Enter supplier name SUPPLIER UNKNOWN

4 Select Correct Contract Status. Click the select contract… link. Click on the applicable radio button to identify the correct contract status for the order – click OK. If no contract exists for the supplier, no contract option will be available. See example.

5 PO Distribution. Check this box if the PO needs to go to an alternate location (the PR will workflow to a central office for update.)

6 Step 2: Item Information. For each item ordered.
1. Not To Exceed Amount – Maximum cost of service.
2. Product Description – A brief explanation of the services to be purchased. Click the expand link as helpful to see the full text.

7 Step 3: Special Approval. Required Field - select the applicable option if the order requires Special Approval.

8 Step 4: Competitive Bid Exception Information. This section must be completed only when the PR is over $5K, there is no supplier contract, and pursuing a competitive bid is not applicable.
1. Exception Type – Select from either: Emergency; Off-Contract; or Sole Source.
2. Exception Justification… – A brief summary explaining why the PR should not go out for competitive bid.
3. Previous Order – Documentation of prior PO granted the same competitive bid exception.
4. Internal Attachments – Use this link to attach all documents relevant to the bid exception request.

9 Save to Cart. Using the drop-down tool, select an option to move item(s) in form to the shopping cart / draft requisition:
A. Add and go to Cart – moves item to cart, closes the form.
B. Add to Cart and Return – moves item to cart, keeps form open, clears Item Information.
C. Add to Cart – moves item to cart, keeps form open, retains Item Information.

Click Go and enter new line items.
When a punch-out shopping session is returned or a KUPPS form is saved, that information is placed into the Shopping Cart of a draft purchase requisition (PR). These instructions describe the editing options of the KUPPS Shopping Cart page.

1. **Open Draft Cart.** Click the shopping cart icon to open the active cart. If no active draft cart exists, the draft carts page will state – 
   ![Image of shopping cart page]

   To create a new cart, either return a punch-out catalog order or complete a form to create a non-catalog / check request draft PR.

2. **Doing Business as:** Each KUPPS PR must be associated with either The KU Center for Research, Inc., or The University of Kansas. The option selected must agree with the Business Unit selected in the Accounting Codes of the draft PR.

3. **Cart Name and Description.** Each KUPPS cart is automatically assigned a unique Cart Name based on the user name and the date created. There is no central requirement to rename the cart. The Description field is initially blank and can be used to provide additional details to administer and track the transaction.

4. **Priority and Shopper.** Changing the priority status from normal to urgent does NOT expedite the PR – it only puts an "urgent" flag on the PR for the workflow approver (suppliers do NOT see the Urgent flag.) Do NOT change the Shopper identity. This change requires exceptional circumstances. Altering the Shopper identity can create downstream workflow problems.

5. **For Selected Line Items.** This drop-down menu provides the following options to edit items in the cart:
   - Add To Favorites – Copy selected item(s) to Favorites folder(s).
   - Remove Selected Items – delete selected items from the cart.
   - Remove All Items – delete all items from the cart.
   - Move to Another Cart – move selected items to another cart.
   - Change Supplier – change the listed supplier for a non-catalog item.
   - Add to Draft Cart or Pending PR/PO – move the selected item(s) to an existing draft cart or one already advanced in the workflow.

   ![Image of shopping cart page with options]

   - Check the applicable lines in the cart and click the Go button. Follow the instructions in the pop-up windows that follow.

6. **Product Description.** Items currently in the shopping cart are identified, including a summary of the line items. Some punch-out suppliers allow changes to quantity in the KUPPS Shopping Cart while other suppliers do NOT allow quantity changes here.
Form (Non-Catalog) Supplier / Line Item Details Edit Options

7 **Edit Non-Catalog Form.** To add or edit items entered into the Shopping Cart from a SciQuest form:
1. Click more info… under Product Description to open the form.
2. Edit the form as necessary.
3. Save changes and return to the Shopping Cart.

8 **Change / View Contract Status.** Changes can be made to the contract status of a transaction in the form and in the draft shopping cart. To view or edit the contract status of a line item:
1. Click on the Select price or contract… link.
2. The Price and Contract pop-up window opens. Click on the applicable radio button to change the contract status if necessary.
3. Click on the OK button to save the change.

Once all Shopping Cart edits have been made:

*Shoppers* can click on the Assign Cart button to directly assign the cart to an applicable Requestor.

*Requestors* can either assign the cart to another Requestor or click on the Review Requisition button to continue editing the draft requisition detail.
KUPPS uses “shopping carts” to build purchase requisitions (PR) that are entered into the workflow. Shopping carts are draft PR’s and KUPPS allows users to have concurrent draft carts. Users can have multiple draft carts, but can only make changes to one cart at a time – the active cart.

1 **Active Cart Status.** In the top right corner of KUPPS page, the active cart tool shows the name of the active cart. In this illustration, there is no active cart.

2 **Create and Select Active Cart options.** When there is no active KUPPS cart, the act of checking-out with a punch-out supplier will automatically create a cart. If an active cart exists, checking-out with a punch-out supplier will put the items into the active cart. To review the draft cart summary, click Carts >> Draft Carts. Options include:
   A. Create a new draft cart:
      1. Click ![Create Cart](image).
      2. Edit the Cart Name and Description as needed and save.
      3. To fill the empty cart, click on ![Continue Shopping](image).
   B. Open an active cart – either click the active cart tool (top right) or the Shopping Cart Name from the draft carts page.
   C. To select a different active cart, click on the Active Cart icon.
   D. Click ![Delete](image) to delete a draft cart. Once deleted, a draft cart cannot be recovered. However, once submitted for approval, a PR record exists forever, even if rejected or withdrawn.
3 **Add Items to Cart.** To add items to an existing cart click **Continue Shopping** and select a punch-out supplier from the KUPPS homepage. Continue shopping from the punch-out supplier and then check-out to add to cart.

4 **Cart Content Administration.** When KUPPS users want to move items from a cart to a favorites folder, or different cart, or remove items altogether:
   1. Open the applicable cart from the draft cart list.
   2. Under the Supplier / Line Item Details, click-on the selection check box for each applicable order line.
   3. Click the **For selected line items** drop-down menu, and select one of the following options:
      - Add To Favorites
      - Rename Selected Items
      - Remove All Items
      - Move to Another Cart
      - Add to Draft Cart or Pending PR/PO
      - Add to PO Revision
   4. Click **Go** to complete the action.

5 **Verify Contract Status.** For non-catalog orders, ensure the cart correctly identifies the cart as either a contract or no contract transaction.
   1. Click **Select price or contract...**
   2. Verify the correct contract status is selected.
   3. Click **OK** to set the contract status.
KUPPS

Requisition User Guides for Non-Catalog Goods Orders:

- Creating a Purchase Requisition
- Editing a Draft Requisition
- Editing Accounting Chartfield Codes
Steps for Creating a Purchase Order in KUPPS

1. Login to KUPPS.

2. Ensure that either no cart or the correct cart is the active cart. Top right of page should look like this: 🛒 0.00 USD 🕵️

3. From the KUPPS homepage, begin shopping by using one of the following methods:
   A. Punch-out Supplier – Click on the icon of the applicable punch-out supplier to begin punch-out shopping;
   B. Hosted Catalog Supplier – Click on one of the supplier icons, use the search tools, and add items to the draft cart; – OR –
   C. Click on either the Non-Catalog Goods Form or Non-Catalog Services Form button. Enter all shopping detail into the form and save.

4. Bring the completed shopping cart back into the KUPPS Shopping Cart.

5. Edit the KUPPS shopping cart as necessary. To add line items, return to the catalog or reopen the Non-Catalog Form and add items.

6. Once the content of the shopping cart is satisfactory, click the Review Requisition button. For Shopper staff whose role is to only shop, click the Assign Cart button and assign the cart to the appropriate Requestor.

7. After opening the Summary – Draft Requisition page, edit/complete the following fields:
   - **General** – Doing Business as: Select either The University of Kansas –or – KU Center for Research, Inc.
   - **Shipping** – Verify/edit the details of the shipping location.
   - **Billing** – Verify/edit the details of the billing location. *Note* – catalog e-invoices are sent back to KUPPS; non-catalog invoices (paper or PDF) are sent to the KU Accounts Payable office for scanning and indexing into the KU ImageNow application.
   - **Accounting Codes** – Shoppers do NOT need to populate these codes before assigning to cart. Requestors submitting the cart for approval must complete this information. Approvers are authorized edit the accounting codes before approval. Click the View/edit by line item... link to enter code values by line item or to split funding by dollar amount.
   - **Internal Notes and Attachments** – Type a short summary of the reason or justification for the order. The note typed here becomes the “Comment From External PO” in FKSU payment records. Attach any file that may be necessary or useful for approval or audit.
   - **Supplier / Line Item Details** – Add notes/attachments here as necessary.

8. Once the draft requisition is satisfactory, click the Submit Requisition for Approval button.

A cart submitted for approval is now a Purchase Requisition (PR) in a KUPPS approval folder. Any Approver for that department or project can open the applicable approval folder and approve or reject the PR. Once approved, a purchase order (PO) is sent to the supplier and a PO is created in FSKU to encumber the transaction for DEMIS reporting.

- Catalog (punch-out) suppliers are sent electronic PO’s; e-invoices return to KUPPS automatically creating PO vouchers in FSKU.
- Non-catalog suppliers are faxed/emailed PO's; suppliers return paper/PDF invoices that workflow through ImageNow creating PO vouchers in FSKU.

Updated – 12/2/2013
The KUPPS Summary Draft Requisition is used to identify, classify, and correctly workflow procurement and check request transactions. To access the Draft Requisition:

A. Shopper/Requestor – Click [Review Requisition] from the draft cart.

B. Approver – Open the PR using the applicable requisition number.

1 General. Click the [edit] button to update:

Doing Business as: – Associate the KUPPS PR with either The KU Center for Research, Inc., or The University of Kansas. This option must agree with the Business Unit in the Accounting Codes.

Cart Name – Each KUPPS cart is automatically assigned a unique Cart Name based on the user name and date created. There is no central requirement to rename the cart.

Description – This field is initially blank and can be used to provide additional details to administer and track the transaction.

Priority – Puts an “urgent” flag on the PR for the workflow Approver.

Shopper / Requestor (identity) – Do NOT change the identity. This change requires exceptional circumstances.

2 Shipping. See Shipping/Billing Address Options on page 2 for the Ship To edit options. Do not edit Delivery Options – it is set for contractual shipping agreements by supplier.

3 Billing. The default address is the KU Accounts Payable office. Non-catalog suppliers should send all manual invoices to this address. Note – forward misrouted invoices to APInbox@ku.edu. Do NOT change the Accounting Date.

4 Accounting Codes. Shoppers are not required to enter codes here. Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

• Click [edit] to update the accounting code chartfields.

• To add Header splits, click [add split] found on the far top right corner of the Accounting Codes tool.

• Click [View/edit by line item] to edit codes by individual line items. Click here for detailed instructions on how to split by line item, dollar amount, or quantity.

5 Internal Notes and Attachments. Internal notes and attachments are for KU records. Click [edit] to enter information relevant to the objective/compliance of the transaction. Internal Notes transfer to PeopleSoft as voucher comments from External PO. Click add attachment… to attach supporting document files.

6 External Notes and Attachments. This information is sent to non-catalog suppliers along with the purchase order. Enter details or attach files that are pertinent to process the PO (i.e., quote document or special shipping instructions.) Click [edit] to enter external notes. Click add attachment… to attach a document file for the supplier (pdf, doc, xls). Ensure the file print format fits within 8½x11”.

29
Shipping Address Options

KUPPS Shipping addresses include all buildings on the main KU campus, the Edwards campus, and other KU locations. System users can create default addresses that will automatically populate new requisitions.

To update an address, click the **Ship To** edit button in the requisition:

1. In the Nickname / Address Text field, type either:
   A. The name of the applicable building; or
   B. The street name in the Address Text field.
   Click **Search**.

2. Identify the correct location/address from the search results and click the applicable **Use** button.

3. From the Selected Address Details, type in the following information:
   - Attn: Name of person receiving the order.
   - Room: Location in building for delivery.
   - Dept: University unit receiving the delivery.
   If this address will not be used in future requisitions, click **Use** to enter this address for the current requisition.

4. If this address will be used in future requisitions, perform these additional actions:
   - Click the "Save this address for future use" checkbox.
   - Name the address in the open text field.
   - Click the "Check this box to make this the default address" checkbox.
   - Click **Use**.
   This address will now automatically populate future requisitions created by the KUPPS user.

5. The address populates the requisition. Verify the details are correct. This address can be changed by anyone downstream in the workflow.

**Note** – In most cases, off-campus shipping locations will not be added to KUPPS. However, accommodations can be made for exceptional circumstances related to cost and critical timing. Contact the Helpdesk with special requests for shipping address updates.
Accounting Codes in KUPPS – Header vs. Line Level

Accounting chartfield codes entered into KUPPS transfer to the KU PeopleSoft Financial System (FSKU) and then DEMIS reporting. KUPPS users enter this detail during the creation and review of the requisition. Accounting codes are entered at either the Header or Line level. To determine which option to use:

Use Header Level Entry when:
• All line item funding splits are the same; and
• All funding splits will be done by percentage (%) only

Use Line Level Entry when:
• There is any variance between line item funding splits; or
• Funding splits are made by:
  a. dollar amount ($); or
  b. quantity within a line item

Enter / Edit Accounting Chartfields in a KUPPS Requisition

1. **Header Level Entry.** Scroll down to the Accounting Codes section and click the edit button. This launches the Accounting Codes pop-up window at the Header level.

1. Manually type or use the Select from* tools to enter the applicable chartfield values in each field:
   • Business Unit (either UKANS or KURES)
   • Speed Chart (auto-fills Business Unit, Fund, Department, and Project numbers in fields. When not used, leave as NONE – this field cannot be left blank)
   • Account
   • Fund
   • Department (must not conflict with Business Unit)
   • Project (this field is populated by using the Speed Chart)
   • Budget Reference (year)
   • Chartfield1 (as applicable by department)
   • KUEA Account (Used only with Fund 725)
   • KURES Project Reimbursable (Used only with Fund 720)
   • KURES Department Reimbursable (Used only with Fund 721)

2. When the cart must be split between different accounting chartfield codes, click the add split link in the top right of the Accounting Codes edit tool. This creates a new accounting chartfield line that may be split by % only. Update the applicable codes in the new line(s). Add more splits as required.

3. Edit the chartfields as applicable.

4. Click Save.

**NOTE** – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

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University of Kansas  Procurement Services – Quick Reference Guide

Updated – 12/2/2013
2 Line Level Entry. Accounting codes must be entered or edited at the line item level instead of the header level when:

- There is variance between line item funding splits; or
- Funding splits must be by: a) dollar amount ($); or b) quantity.

To split funding at the Line Item Level:

1. Click on the Accounting Codes tab (or View/edit by line item… link in the Accounting Codes section of the Requisition Summary.) The requisition view changes from Summary to Accounting Codes.
2. In the Supplier / Product Description section, click the button of the applicable line item. This launches the Accounting Codes editing tool for the selected line.
3. Manually type or use the Select from* tools to enter the applicable chartfield values (See step 1.1 list for field list detail.)
4. To split a specific line item, click the add split link in the top right of the Accounting Codes pop-up window. This creates a new accounting chartfield line. Options to split the line item include:
   A. % of Price;
   B. Amount of Price; or
   C. Amount of Quantity
   (NOTE – splits at the header level only offer option A)
5. Add more splits are necessary.
6. Edit the applicable accounting codes in the new line(s).
7. Click Save.

When lines vary from codes entered at the header level, the line will denote –

When lines match codes entered at the header level, the line will denote –

NOTE – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

Select from tools allow users to Search for and select codes by either numeric Values or alpha character Descriptions. Use the asterisk (*) as a wildcard to search for values within a known range.

Example – 137* in the Value field returns all codes starting with 137.
"Office Supplies" in the Description field returns all codes with that phrase.
Guides on How to Approve Non-Catalog Goods Orders:

- Approving A Requisition
- Approving a WebNow Non-Catalog Invoice
- Email Approval for Requisitions
- Approve E-Invoice Greater than 5000
To approve KUPPS requisitions, first sign in to the myKU portal. The myKU portal link is located at the top right hand corner of the ku.edu homepage. The KU portal username and password is typically the same as the user’s university e-mail username and password.

1 Approvals. Once logged in, click the Approvals tab to access all the options available for viewing, editing, and approving Purchase Requisitions (PR) waiting for approval.

2 Review / Identify Pending Requisitions.
KU Approvers are often authorized to approve requisitions for multiple workflow rules. Requisitions needing approval are organized in workflow approval folders that function much like Window Explorer folders. However, requisitions pending approval can also be displayed in a List format. Steps:
   2.1 Select the Folder or List view option using the Group Results By: dropdown tool.
   2.2 Locate the applicable Approval folder and click on the expansion arrow tool to open the folder and view the summary of requisitions awaiting approval in that folder.
   2.3 Click the Show requisition details / expand all / collapse all options as needed to organize the pending requisitions.

3 Assign the Purchase Requisition.
Click the button of the PR. This moves the PR to the My PR Approvals folder. Once an Approver assigns a PR to the My PR Approvals folder, no other Approver can edit or approve that requisition. But, a PR can be returned to the shared approval folder for another Approver to act on.
Note – Pending requisitions can be approved but cannot be edited unless the requisition is assigned to an Approver.

4 Approval Filter Options.
Filters allow Approvers to quickly view a limited selection of folders and/or requisitions. This is helpful when an Approver has many requisitions / workflows to review. The filters are dynamic and are easily changed as necessary.
To open a particular filter option, click the add filter icon.

5 Open PR for Review.
Click on the Requisition number (12345678) to open the requisition document for review. Either link to the Requisition Number will open the requisition document.
To return to the Approvals page summary, click the Approvals tab from any page in KUPPS.
Correct Missing or Erroneous Detail.
After opening an assigned requisition, any required information that is missing will be highlighted in yellow. Once all missing detail is entered, the requisition can be approved.

Approve or Reject (or other options for) the PR. From the Available Actions: drop-down list, take one of the following actions:

A. Approve/Complete Step – Approve the pending PR to send a PO to the supplier or send the PR to a central workflow approver.
B. Return to Shared Folder – Returns PR to department approval folder for another Approver to review and approve/reject.
C. Place PR on Hold – Puts PR in a temporary hold status.
D. Add Comment – Add a comment that can be sent to a KUPPS user in an e-mail.
E. Copy to a New Cart – Copy details into a new cart for use later.
F. Reject Requisition – Approver terminates PR without creating PO for supplier.

After selecting the desired action, click the Go button to complete the selected option (A-F).

Edit Line Item Details – Optional. Some suppliers allow KUPPS Approvers to reject one or more line items from a PR while other suppliers do not allow this type of editing. This option is turned off for suppliers that do not allow this type of Approver editing.

To edit line items before approval:
1. Navigate to Supplier/Line Item Details section of the PR.
2. Click the empty checkbox next to the line item(s) to reject.
3. Select Reject Selected Items from the dropdown menu.
4. Click the Go button.
5. Add the required comment to document the reason for rejecting the selected line item(s).

After deleting the undesired line items, click Approve/Complete Step (as shown in 7) to approve the remaining requisition after editing line item detail.
Non-catalog purchase requisitions (PR) are used to purchase goods and services from suppliers. These requisitions result in non-catalog purchase orders (PO) that are distributed to suppliers through either fax or email.

To receive payment for these orders, suppliers return manual (paper) invoices to the central Accounts Payable (AP) office. These invoices are scanned and indexed (electronic record of invoice detail) and put into an ImageNow workflow for approval or return.

These instructions illustrate how to approve (or return) a non-catalog purchase order invoice using WebNow.

1. **Receive Email Notice.** After an invoice is received, scanned, and indexed by the AP Office, an email notification is sent to the appropriate approver(s) through an ImageNow. This email will provide a summary that identifies the Vendor Name, the Invoice Number, the $Amount, and the applicable PO number.

   Click the **embedded link** to access the invoice record.

2. **Open WebNow.** Non-catalog invoice approvals are work-flowed through ImageNow. WebNow allows system users to access these records using a web browser.

   1. Click on the **Run** button
   2. Type in the **User Name** (KU Portal ID)
   3. Type in the **Password** (KU Portal password)
   4. Click **Connect**
Opening WebNow from the embedded email link will take the Approver directly to the task identified in the email. When the WebNow window opens, other pending tasks for the Approver will also be accessible.

3 Review the Invoice. The invoice is in a pending task workflow status. Once an invoice is approved, the action results in the creation of a PO Voucher to pay the supplier. Before either approving or returning an invoice, an Approver should review the invoice record.

**KUPPS PO**
Open the applicable KUPPS non-catalog PO for the invoice. The PO number is found on the email notice and should be present on the image of the invoice. Verify that critical data between the PO and invoice are consistent.

4 Approve or Return the Invoice.
To approve the invoice, click the Complete button. This action results in the creation of a PO Voucher to pay the supplier.
- or -
To return the invoice because of unacceptable conditions associated with the document or indexed information:
1. Click the Return button. The Return Task tool box will appear.
2. Select a reason for return and enter a comment if applicable.
3. Click the OK button.
This action results in the return of the invoice back to the central AP Office - Exceptions team, for investigation and resolution.

All invoice records can be access through WebNow. Instructions are under a separate Quick Reference Guide.

WebNow Tool Tips
Click on the icons for the following review options:
B. Magnify/Reduce the document image.
C. Rotate the document image.
D. Fit window, width, or height of document in viewer window.
E. Hide/unhide annotation seen on document.
F. Navigate document when zoom is > 100% (click-hold-drag)
G. Add “sticky-note” to document.
H. Add Annotation to document.
I. Drawing tools to emphasize details on document.
J. Page navigation tools when document is more than one page.

DEMIS
In some instances, an invoice will pay for an entire PO. In other cases, an invoice will only pay for part of a PO. Use DEMIS report PO Activity Report.srx to determine how much of the PO encumbrance has been / will be relieved by the payment resulting from the invoice.
KUPPS Approvers can approve Requisitions through email notification without logging directly into KUPPS. These instructions are for approving KUPPS requisitions (PR's) directly through the email notification.

**NOTE** – Email notifications provide significant detail about each PR, but may not fully illustrate complex accounting code split details. Approvers are responsible for the accurate assignment of chartfield detail. Open the requisition in KUPPS if you are unsure about the information provided in the email notice.

### Approve a PR through the Email Notification

1. **Review New Pending Approval for Requisition Email.**
   Open the New Pending Approval email for the applicable PR. Review the details of the PR.

2. **Take Action.**
   - If there is enough information in the email notice to make a decision, click the **Take Action** button.
   - Or –
   
   If there is not enough information in the email notice, click the [Click here to view the document in your organization's site](#) link. This will prompt a login to KUPPS to review the PR in greater detail. See [Approving A Requisition](#) for additional information on this action.
3 Select Action. A new web browser window will open with the following actions to select from:
- Approve – Completes the approval of the PR.
- Assign to myself – Prevents other Approvers authorized to approve the PR from having access to approve or reject. This action does not approve the PR, but allows the Approver to edit the PR within the KUPPS application.
- Reject – Terminates the PR so that it may no longer be used.
- Return to Requisitioner – Notifies the requisitioner to take corrective active on the PR and resubmit for approval. It does not terminate the PR – it pushes it back within the workflow.

Comment – Type a comment if applicable to the transaction.

Click the Submit button to submit the action selected.

4 Confirm Action. Click the OK button to confirm the action.

The outcome will be tracked in the History of the PR document. The entry will record that it was approved via email.

“Requisition approved (via email)”
Catalog suppliers return electronic invoices (e-invoices) to KUPPS at the time of shipment. In the P2P environment, invoices result in voucher payments in the KU Financial System (FSKU). However, e-invoices greater than $5000 require approval in KUPPS before creating approved PO Vouchers in FSKU.

1 Approvals. Once logged into KUPPS, click the approvals tab to access all the options available for viewing, editing, and approving invoices awaiting approval.

2 Identify / Open Pending Invoice(s).
Under Refine Search Results, ensure the approval Type is for Invoice. Allow the filter to return only invoices. Click on the Voucher No. (S0000123) to open the invoice document for review.

3 Review Pending Invoice and Approve.
Once the invoice document displays, review each section as necessary and approve the invoice.

3.1 Accounting Codes review.
3.2 Line Item Detail – Product Descriptions review. Compare to PO to determine if the invoice is a whole or partial invoice of the PO.
3.3 Invoice approval does not require an Approver to first Assign the invoice. Approvers can select Assign/Complete step and click Go to approve an invoice. Additional options are available if an approver chooses to assign an invoice.*

After the invoice is approved, an approved PO Voucher is created in FSKU to pay for the invoice.

* Do NOT Reject an Invoice unless absolutely certain the invoice will never be used to create a PO voucher. Once rejected, the KUPPS invoice document can no longer be used to create a voucher in FSKU.
KUPPS

User Guides for Check Requests

- Creating a Check Request
- Tracking a Check Request
- Creating Check Refund Request
- Approving a Check Request
- Editing a Draft Requisition
- Editing Accounting Chartfield Codes
Check Requests are used to create voucher payments for invoices and other expenditures when KUPPS purchase orders are not used. The Check Request form goes into a KUPPS purchase requisition (PR) and follows the applicable workflow approval process.

These instructions are for completing the Check Request form. See Draft Requisition Editing Options for additional information on submitting a PR for approval.

**Create a Check Request**

Before creating a KUPPS Check Request PR, ensure the invoice exists in electronic format so it can be attached to the Check Request form. Create and attach 1 file for each Check Request PR.

Paper invoices should be scanned to PDF format. Acceptable attachment formats include: .doc, .docx, .xls, and .xlsx. Certain file formats are not compatible. Do not use email file types .msg or .eml as an invoice attachment. If an invoice is in this file type format, save the file to .pdf format and use that copy as the file attachment.

1. **Select/Open the Check Request Form.** From the KUPPS homepage, click the Check Request form. This action will directly open the Check Request form.

2. **Alternate Method to Open the Check Request Form**

   1. **Open The Forms Page.** From the KUPPS homepage, click the forms tab.

   2. **Select the Applicable Form.** In the left column, expand the options under Shared (click on the button) and click KU Forms. In the right column, click Check Request to open the form.
Check Request Form

3 Step 1: Supplier and Contract Information. Pick either option:

A. Manually type in the supplier name. KUPPS will automatically identify the supplier based on the name typed into the field.

B. Click the supplier search link to search the full list of suppliers in KUPPS then click the Select link.

If the supplier needs to change, click the select different supplier link and use either option A or B:

Click here for resources to Add or Change a KU P2P vendor. See page 3 for Wire Transfer, NRA payments, or < $5 Invoice info.

4 Select Correct Contract Status. Click the select contract… link. Click on the applicable radio button to identify the correct contract status for the order – click OK. If no contract exists for the supplier, no contract option will be available.

5 Remit To Address. If the address in KUPPS does not match the payment address on the invoice or other documentation, enter the correct address detail into the Internal Note of the draft requisition.

NOTE – Verify this address exists in the PeopleSoft vendor file. If the address does not exist, add it to the PeopleSoft vendor file using the Change Vendor form.

6 Step 2: Invoice Information. Enter the following information:

1. Supplier Inv # – Unique identifier on the invoice.
2. Invoice Date – The date on the invoice.
3. External Attachments – click the add attachments… link. Click the Browse button and navigate to the electronic copy of the invoice. Select the file and click the Open button. No File Name is required in the External Attachments tool. Click Save.

7 Justification Information. Using the drop-down tool select one of the following reasons for the check request payment:

1. After the Fact; Invoice Only
2. Honoraria
3. Moving Expense
4. Participant Payment
5. Payment between KUCR & KU
6. Recruitment

8 Step 4: UOM. Select applicable unit of measure. Save/reopen a new form if varying UOM’s are on the invoice line items.

9 Step 5: Item Information. For each line item on the invoice, type in the Description, Unit Price and Quantity for each line item. The total of the Item Information populates at the bottom right of the form.

10 Save to Cart. In the drop-down tool, select the applicable option and click Go. Typically, use the Add and go to Cart option. If more than 5 line items are required, select the Add to Cart option, click Go and enter new line items.

After completing the form and saving, continue to the draft requisition, complete the required fields, and submit for approval.
Requisition Requirements

11 Payment Message. In the Check Request Use Only section, click the edit button and type a Payment Message in the open text field. This is required for all KURES business unit check requests.

Examples include:
- Account / customer number
- Order / Sales Order Number
- Lengthy invoice number(s)
- Date and location of travel for non-employee

If No Invoice Number:
- Date of service
- Description of reimbursement
- Purpose of payment
- Study (participant payment)

NOTE – Handling Code information is entered by Central staff only.

12 Internal Notes for Special Processing

Wire Transfers. UKANS Check Request are payable to the Bursar’s Office. The Check Request amount must include $25 for the wire fee in addition to the amount of the payment. The Internal Note of the Check Request requisition must contain the following information:
- Description of item purchased
- Name of vendor
- Bank name
- Bank city
- Bank country
- SWIFT number
- Account number or IBAN (INat’l Bank Account Number)

Non-Resident Alien (NRA). Include the following detail/attachments for payments to NRA’s in the Internal Note:
- Complete nonresident alien information in Glacier
- W-8BEN (if student)
- Form 8233 (if non-student)
- Copy of passport

Return Check to Department. When checks must be returned to the originating KU department, enter detailed instructions here.

Remit To Address Change. Record the correct Remit To address here. Use Change Vendor form to add to the PeopleSoft vendor file.

Interfunds Payment. Identify payments to state agencies here.

MISC Invoices Less Than $5.00

Check Requests must be greater than $5. If an invoice is for less than $5, combine that invoice with a subsequent invoice from the same vendor so the Check Request totals more than $5.

- Include both invoice numbers in the Supplier Inv # field of the Check Request form. Enter a blank space between invoice numbers. This field is limited to 30 characters – use the PR Payment Message field if necessary (step 11).
- Save the invoice attachments as one file.
KUPPS Check Requests result in PeopleSoft vouchers. This guide demonstrates the steps required to track a KUPPS Check Request from requisition to PeopleSoft voucher.

1. **Open The KUPPS PR Record.** Check Requests create a PO document in KUPPS (with no encumbrance in PeopleSoft). This allows an electronic Invoice record to be created in KUPPS that integrates to PeopleSoft as a voucher. Steps to locate:
   1. Click on the PO number (KU00012345) or view link to open the KUPPS PO document.

2. **Review the KUPPS PO - Invoice Record.** After the PO loads, click on the Invoices tab. The 8-digit (50005678) Invoice number identified in the Invoicing Summary is the PeopleSoft Voucher number.

3. **Open the Voucher in PeopleSoft.** Sign in to the KU Financial System (FSKU) in PeopleSoft. Search for the voucher. Steps:
   1. Accounts Payable > Vouchers > Add/Update > Regular Entry
   2. Select the applicable Business Unit (UKANS/KURES)
   3. Type-in the Invoice number found in KUPPS
   4. Click the Search button

The voucher record in PeopleSoft will populate.
Departmental Refund Requests are a type of check request used for refund payments from the University. These KUPPS requisitions workflow to the KU Bursar’s Office for central review and approval.

The create a KUPPS Refund Check Request:

1. **Open the Departmental Refund Request Form.** Steps:
   1. **Login to KUPPS,** click the **forms** tab.
   2. **Select the Departmental Refund Request** option under **Shared.**
   3. **Click on the Departmental Refund Request link.**

2. **Step 1: Supplier Information.** Pick either option:
   - A. **Manually type in the supplier name.** KUPPS will automatically identify the supplier based on the name typed into the field.
   - or –
   - B. **Click the supplier search link** to search the full list of suppliers in KUPPS then click the **Select link.**
   
   If the supplier needs to change, click the **select different supplier link** and use either option A or B:
   - C. **Click here for resources to Add or Change a KU P2P vendor.**

3. **Remit To Address.** If the address in KUPPS does not match the payment address on the invoice or other documentation, enter the correct address detail into the Internal Note of the draft requisition.

4. **Step 2: Invoice Information.** Enter the following information:
   1. **Supplier Inv #** – Unique identifier on the invoice.
   2. **Invoice Date** – The date on the invoice.
   3. **External Attachments** – click the **add attachments...** link. Click the **Browse button** and navigate to the electronic copy of the invoice. Select the file and click the **Open button.** No **File Name** is required in the External Attachments tool. Click **Save.**

5. **Step 3: Departmental Refunds / Refund Type.** Using the drop-down tool, select the applicable Refund Type option.

6. **Step 4: Refund Description.** Manually type in the **Refund Amount** (ex. 123.00) and the **Description** of the refund.

7. **Save to Cart.** In the drop-down tool, select the applicable option and click **Go.** Typically, use the **Add and go to Cart option.** If more than 5 line items are required, select the **Add to Cart option,** click **Go** and enter new line items.

   After completing the form and saving, continue to the draft requisition, complete the required fields, and submit for approval. For more information on completing check requests and the check request requisition, see the KUPPS Quick Reference Guide, KUPPS Check Requests.
KUPPS Approving a Check Request

Check Requests are a type of requisition that require workflow approval through KUPPS. To approve a check request, first sign in to the myKU portal. The myKU portal link is located at the top right hand corner of the ku.edu homepage. The KU portal username and password is typically the same as the user's university e-mail username and password.

1 Approvals. Once logged in, click the Approvals tab to access all the options available for viewing, editing, and approving Purchase Requisitions (PR) waiting for approval.

2 Review / Identify Pending Check Request Requisitions.
KU Approvers are often authorized to approve requisitions for multiple workflow rules. Requisitions needing approval are organized in workflow approval folders that function much like Window Explorer folders. However, requisitions pending approval can also be displayed in a List format. Steps:

2.1 Select the Folder or List view option using the Group Results By dropdown tool.
2.2 Locate the applicable Approval folder and click on the expansion arrow tool to open the folder and view the summary of requisitions awaiting approval in that folder.
2.3 Click the Show requisition details / expand all / collapse all options as helpful to evaluate pending requisitions.

3 Assign the Purchase Requisition.
Click the button of the PR. This moves the PR to the My PR Approvals folder. Once an Approver assigns a PR to the My PR Approvals folder, no other Approver can edit or approve that requisition. But, a PR can be returned to the shared approval folder for another Approver to act on.

Note – Pending requisitions can be approved but cannot be edited unless the requisition is assigned to an Approver.

4 Approval Filter Options.
Filters allow Approvers to quickly view a limited selection of folders and/or requisitions. This is helpful when an Approver has many requisitions / workflows to review. The filters are dynamic and are easily changed as necessary.

To open a particular filter option, click the add filter icon.

5 Open PR for Review.
Click on the Requisition number (12345678) to open the requisition document for review. Either link to the Requisition Number will open the requisition document.

To return to the Approvals page summary, click the Approvals tab from any page in KUPPS.
Correct Missing or Erroneous Detail.
After opening an assigned requisition, any required information that is missing will be highlighted in yellow. Once all missing detail is entered, the requisition can be approved.

* See the following page for reviewing the invoice copy or editing the Check Request form.

Approve or Reject (or other options for) the PR. From the Available Actions: drop-down list, take one of the following actions:

A. **Approve/Complete Step** – Approve the pending PR to send a PO to the supplier or send the PR to a central workflow approver.
B. **Return to Shared Folder** – Returns PR to department approval folder for another Approver to review and approve/reject.
C. **Place PR on Hold** – Puts PR in a temporary hold status.
D. **Return to Requestor** – Returns Check Request to the originator for update or correction.
E. **Forward to …** – Change Approver for Check Request
F. **Add Comment** – Add a comment that can be sent to a KUPPS user in an e-mail.
G. **Copy to a New Cart** – Copy details into a new cart for use later.
H. **Reject Requisition** – Approver terminates PR without creating PO for supplier.

After selecting the desired action, click the **Go** button to complete the selected option (A-H).
8. **Review the Invoice / Change Check Request Detail.**

To review the electronic copy of the invoice or change the detail in the Supplier / Line Item Details of the requisition, the Approver must open the form:

8.1 Click on one of the *more info...* links under the Product Description. This opens the Check Request form in a new window.

8.2 Edit each field as required.

8.3 To view the e-copy of the invoice document, click on the link under External Attachments. Approvers can update this file as required.

8.4 From the Available Actions list, select Save, click the **Go** button, and click the **Close** button.
The KUPPS Summary Draft Requisition is used to identify, classify, and correctly workflow procurement and check request transactions. To access the Draft Requisition:

A. Shopper/Requestor – Click **Review Requisition** from the draft cart.
B. Approver – Open the PR using the applicable requisition number.

1. **General.** Click the **edit** button to update:

   Doing Business as: – Associate the KUPPS PR with either The KU Center for Research, Inc., or The University of Kansas. This option must agree with the Business Unit in the Accounting Codes.

   Cart Name – Each KUPPS cart is automatically assigned a unique Cart Name based on the user name and date created. There is no central requirement to rename the cart.

   Description – This field is initially blank and can be used to provide additional details to administer and track the transaction.

   Priority – Puts an “urgent” flag on the PR for the workflow Approver.

   Shopper / Requestor (identity) – Do NOT change the identity. This change requires exceptional circumstances.

2. **Shipping.** See **Shipping/Billing Address Options** on page 2 for the **Ship To** edit options. Do not edit **Delivery Options** – it is set for contractual shipping agreements by supplier.

3. **Billing.** The default address is the KU Accounts Payable office. Non-catalog suppliers should send all manual invoices to this address. **Note** – forward misrouted invoices to APInbox@ku.edu

   Do NOT change the Accounting Date.

4. **Accounting Codes.** Shoppers are not required to enter codes here. Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

   • Click **edit** to update the accounting code chartfields.

   • To add Header splits, click **add split** found on the far top right corner of the Accounting Codes tool.

   • Click **View/edit by line item…** to edit codes by individual line items.

   **Click here for detailed instructions on how to split by line item, dollar amount, or quantity.**

5. **Internal Notes and Attachments.** Internal notes and attachments are for KU records. Click **edit** to enter information relevant to the objective/compliance of the transaction. Internal Notes transfer to PeopleSoft as voucher comments from External PO.

   **Click add attachment…** to attach supporting document files.

6. **External Notes and Attachments.** This information is sent to non-catalog suppliers along with the purchase order. Enter details or attach files that are pertinent to process the PO (i.e., quote document or special shipping instructions.) **Click edit** to enter external notes.

   **Click add attachment…** to attach a document file for the supplier (pdf, doc, xls). Ensure the file print format fits within 8½”x11”.

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University of Kansas  Procurement Services – Quick Reference Guide  Updated – 12/4/2013
Shipping Address Options

KUPPS Shipping addresses include all buildings on the main KU campus, the Edwards campus, and other KU locations. System users can create default addresses that will automatically populate new requisitions.

To update an address, click the **Ship To** button in the requisition:

1. In the Nickname / Address Text field, type either:
   A. The name of the applicable building; or
   B. The street name in the Address Text field.
   Click **Search**.
2. Identify the correct location/address from the search results and click the applicable **Use** button.
3. From the Selected Address Details, type in the following information:
   • Attn: Name of person receiving the order.
   • Room: Location in building for delivery.
   • Dept: University unit receiving the delivery.
   If this address will not be used in future requisitions, click **Use** to enter this address for the current requisition.
4. If this address will be used in future requisitions, perform these additional actions:
   • Click the "Save this address for future use" checkbox.
   • Name the address in the open text field.
   • Click the "Check this box to make this the default address" checkbox.
   • Click **Use**.
   This address will now automatically populate future requisitions created by the KUPPS user.
5. The address populates the requisition. Verify the details are correct. This address can be changed by anyone downstream in the workflow.

**Note** – In most cases, off-campus shipping locations will not be added to KUPPS. However, accommodations can be made for exceptional circumstances related to cost and critical timing. Contact the Helpdesk with special requests for shipping address updates.
Accounting Code Chartfields in KUPPS – Header vs. Line Level

Accounting chartfield codes entered into KUPPS transfer to the KU PeopleSoft Financial System (FSKU) and then DEMIS reporting. KUPPS users enter this detail during the creation and review of the requisition. Accounting codes are entered at either the Header or Line level. To determine which option to use:

**Use Header Level Entry when:**
- All line item funding splits are the same; and
- All funding splits will be done by percentage (%) only

**Use Line Level Entry when:**
- There is any variance between line item funding splits; or
- Funding splits are made by:
  - a. dollar amount ($); or
  - b. quantity within a line item

Enter / Edit Accounting Chartfields in a KUPPS Requisition

1. **Header Level Entry.** Scroll down to the Accounting Codes section and click the edit button. This launches the Accounting Codes pop-up window at the Header level.

1. Manually type or use the Select from* tools to enter the applicable chartfield values in each field:
   - Business Unit (either UKANS or KURES)
   - Speed Chart (auto-fills Business Unit, Fund, Department, and Project numbers in fields. When not used, leave as NONE – this field cannot be left blank)
   - Account
   - Fund
   - Department (must not conflict with Business Unit)
   - Project (this field is populated by using the Speed Chart)
   - Budget Reference (year)
   - Chartfield1 (as applicable by department)
   - KUEA Account (Used only with Fund 725)
   - KURES Project Reimbursable (Used only with Fund 720)
   - KURES Department Reimbursable (Used only with Fund 721)

2. When the cart must be split between different accounting chartfield codes, click the add split link in the top right of the Accounting Codes edit tool. This creates a new accounting chartfield line that may be split by % only. Update the applicable codes in the new line(s). Add more splits as required.

3. Edit the chartfields as applicable.

4. Click **Save**.

**NOTE** – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.
**2. Line Level Entry.** Accounting codes must be entered or edited at the line item level instead of the header level when:

- There is variance between line item funding splits; or
- Funding splits must be by: a) dollar amount ($); or b) quantity.

To split funding at the Line Item Level:

1. Click on the **Accounting Codes** tab (or View/edit by line item… link in the Accounting Codes section of the Requisition Summary.) The requisition view changes from Summary to Accounting Codes.
2. In the **Supplier / Product Description** section, click the **button** of the applicable line item. This launches the Accounting Codes editing tool for the selected line.
3. Manually type or use the **Select from** tools to enter the applicable chartfield values (See step 1.1 list for field list detail.)
4. To split a specific line item, click the add split link in the top right of the Accounting Codes pop-up window. This creates a new accounting chartfield line. Options to split the line item include:
   A. % of Price;  
   B. Amount of Price; or  
   C. Amount of Quantity  
   (NOTE – splits at the header level only offer option A)
5. Add more splits are necessary.
6. Edit the applicable accounting codes in the new line(s).
7. Click **Save**.

When lines vary from codes entered at the header level, the line will denote – **Accounting Codes** values have been overridden for this line.

When lines match codes entered at the header level, the line will denote – **Accounting Codes** (same as header)

**NOTE** – Requestors must enter: Business Unit; Speed Chart; Account; Fund; and Department. If an Approver edits the codes, the Requestor only needs to enter enough detail to workflow the PR forward.

**Select from** tools allow users to **Search** for and **select** codes by either numeric Values or alpha character Descriptions. Use the asterisk (*) as a wildcard to search for values within a known range.

**Example** – 137* in the Value field returns all codes starting with 137. 
"Office Supplies" in the Description field returns all codes with that phrase.
KUPPS

User Guides for Searching for
Documents

- Searching KUPPS Document History
- Finding an E-Invoice
- Finding a Check Request or Non-Catalog Invoice
- Searching WebNow (Link to WebNow
- Printing WebNow Invoice
Search for Documents – PR’s, PO’s, & Invoices

There are three transactional document types in KUPPS:
1. Purchase Requisitions (PR)
2. Purchase Orders (PO)
3. Invoice (e-invoice)

System users can access documents for any department – there is no restriction. Every KUPPS transaction begins as a draft cart that is used to create a PR. PO’s are the central record for most transactions and provide quick access to both the originating PR and e-invoice (for punch-out shopping orders.) The document history search provides both Simple and Advanced options for locating documents.

Simple Search

1. Open document search. From any KUPPS page:
   1. Click on the Orders & Documents tab and then click on Search Documents.
   2. Choose between the available sort options:
      - my requisitions
      - my purchase orders
      - my invoices – or –
      - Select document type: Requisition; Purchase Orders; or Invoices.
      - Type in keyword (ex. User last name; supplier name, etc.)
      - Select an applicable date range for the search.
   3. Click the Go button.

2. Refine Filters from Initial Search Results. Once the primary search results are returned from the Simple Search, additional search criteria can be dynamically selected to narrow the search results. Additional filters include:
   - Department
   - Supplier
   - User Name

   Click on this icon to open the full list of options within a filter.

   1. Review the Settlement Status to determine invoice status.
      a. No matches (no invoice received for any part of the an order)
      b. Partially Invoiced
      c. Fully Invoiced
   2. Click the PO No. (KU00001234); or Requisition No. (12345678); or Invoice No. (1234567) to open the specific document record.
Advanced Search

1. **Open document search.** From any KUPPS page:
   1. Click on the **Orders & Documents** tab and then click on **Search Documents**.
   2. Click **advanced search**

   This opens the Advanced Search options. The advanced filter option provides immediate access to additional filter criteria.

2. **All Documents search.** The **All Documents** search option provides immediate search filters for the:
   3. document number
   4. user names
   5. dates
   6. department name
   7. supplier and product detail.

   Because this option searches across all PR, PO, and e-invoice documents, the initial number of filter options is limited.

   To access more immediate filters, select the Requisition, Purchase Order or Invoice as the initial Search criteria.

3. **Requisition, Purchase Order, & Invoice search.**

   By selecting a specific document type in the first Advanced Search option, users have immediate access to filters that are specific to each document type.

   These same filters become available in subsequent, dynamic searches. There is no preferred method to search for documents. The key is to begin the search with enough information that is a filter criteria. The following page provides a list of document filters for each document search type.

   Once the search results return, either click on the applicable document number to open the document record or chose additional filter criteria to narrow the search results.
<table>
<thead>
<tr>
<th>Purchase Requisition Search Filters</th>
<th>Purchase Order Search Filters</th>
<th>Invoice Search Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Numbers(s)</td>
<td>Purchase Order Number(s)</td>
<td>Invoice Number(s)</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Participant(s)</td>
<td>Invoice Name</td>
</tr>
<tr>
<td>Participant(s)</td>
<td>Owner</td>
<td>Supplier Invoice Number(s)</td>
</tr>
<tr>
<td>Prepared For</td>
<td>Prepared By</td>
<td>Participant(s)</td>
</tr>
<tr>
<td>Prepared By</td>
<td>Approved By</td>
<td>Invoiced By</td>
</tr>
<tr>
<td>Approved By</td>
<td>Date (various range options)</td>
<td>Invoice Owner</td>
</tr>
<tr>
<td>Total Amount (various $ range options)</td>
<td>Total Amount (various $ range options)</td>
<td>Approved By</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier</td>
<td>Date</td>
</tr>
<tr>
<td>Department</td>
<td>Department</td>
<td>Total Amount</td>
</tr>
<tr>
<td>Catalog Number (SKU)</td>
<td>Catalog Number (SKU)</td>
<td>Supplier</td>
</tr>
<tr>
<td>Product Description</td>
<td>Product Description</td>
<td>Department</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>Commodity Code</td>
<td>Catalog Number (SKU)</td>
</tr>
<tr>
<td>Form Name</td>
<td>Form Name</td>
<td>Product Description</td>
</tr>
<tr>
<td>Form Type</td>
<td>Form Type</td>
<td>Commodity Code</td>
</tr>
<tr>
<td>Contract Number</td>
<td>Contract Number</td>
<td>Form Name</td>
</tr>
<tr>
<td>Purchase Order Number</td>
<td>Requisition Number(s)</td>
<td>Form Type</td>
</tr>
<tr>
<td>Current Workflow Step</td>
<td>Requisition Name</td>
<td>Contract Number</td>
</tr>
<tr>
<td>Workflow Status</td>
<td>Invoice Numbers(s)</td>
<td>Purchase Order Number(s)</td>
</tr>
<tr>
<td>Status Flags</td>
<td>Invoice Name</td>
<td>Current Workflow Setup</td>
</tr>
<tr>
<td>Accounting Codes (Fund, Account, Department, etc.)</td>
<td>Supplier Invoice Number(s)</td>
<td>Workflow Status</td>
</tr>
<tr>
<td></td>
<td>Supplier Status</td>
<td>Matching Status</td>
</tr>
<tr>
<td></td>
<td>Receipt Status</td>
<td>Invoice Status</td>
</tr>
<tr>
<td></td>
<td>Invoice Status</td>
<td>Invoice Type</td>
</tr>
<tr>
<td></td>
<td>Matching Status</td>
<td>Payment Status</td>
</tr>
<tr>
<td></td>
<td>AP Status</td>
<td>Status Flags</td>
</tr>
<tr>
<td></td>
<td>Status Flags</td>
<td>Accounting Codes (Fund, Account, Department, etc.)</td>
</tr>
<tr>
<td></td>
<td>Accounting Codes (Fund, Account, Department, etc.)</td>
<td></td>
</tr>
</tbody>
</table>
Access Electronic Invoices in the Purchase Order

Punch-out vendors do not mail or email invoices. Invoices for KUPPS punch-out orders come back to KUPPS as an electronic invoice (e-invoice). The data delivered to KUPPS also creates automated voucher payments in FSKU.

1 Locate KUPPS Electronic Invoices.
To determine if a supplier has invoiced a purchase order, search for the applicable KUPPS purchase order and click the Invoices subtab.

Individual purchase orders may receive multiple e-invoices, especially for large orders or when certain items are on back order. To determine what items have been e-invoiced, review the Status:
- Un-invoiced line items = Open
- Partially Invoiced Order = Partially Invoiced
- Invoiced line items = Net Invoiced

2 Open KUPPS Electronic Invoices.
To open and view an invoice, click on the invoice number or the open a printable version by clicking on the printer icon.

Each e-invoice record in KUPPS has two numbers assigned to it: 1. Invoice Number – A unique, seven-digit number automatically generated by KUPPS for each e-invoice received. 2. Supplier Invoice Number – This number is the primary identifier used by a supplier for the invoice record. When cross-referencing data between KUPPS and FSKU, remember:

FSKU Invoice No. = KUPPS Supplier Invoice No.

These invoices do NOT need to be printed for central auditing.
Find a Check Request Invoice Record In KUPPS

Check Requests are used to create a voucher payments for invoices when no KUPPS purchase order (PO) was used. Historical Check Request detail is found in the KUPPS Document History. A copy of the invoice is also found in the KUPPS Check Request document. Check Request invoices are also found in ImageNow/WebNow.

To locate a Check Request invoice record in KUPPS:

1. **Open The Forms Page.** From any KUPPS page, click on the **Orders & Documents** tab and then click on **Search Documents**. If the simple search page appears, click on the **advanced search** link for more filter options.

2. **Key Filter Data.**
   1. Ensure the Search criteria option is set for **Requisition**.
   2. Type “Check Request” in the **Product Description** field.
   3. Use other filter criteria to narrow the search. Participants(s) and Department are often helpful filters.
   4. Click **Go**.

3. **Select the Requisition.** After the search results return, click the requisition number to open the Check Request document.

4. **Review the Requisition.** Details of the Check Requisition are found on the Requisition-Summary tab.

   To open a copy of the scanned invoice document:
   1. Click the **Attachments** tab.
   2. Click the **Attachment link**.

The invoice file will display in a new browser window.
Find a Check Request or Non-Catalog Invoice

Find a Non-Catalog or Check Request Invoice In WebNow

Non-catalog purchase orders (PO’s) receive manual invoices that are received by the Central Accounts Payable (AP) office. These invoices are scanned and indexed (electronic record of invoice detail) into ImageNow. Non-catalog invoices are NOT tracked through KUPPS.

Check Request invoices are entered into KUPPS as an attachment at the time the check request is created. These invoices can be found in KUPPS or ImageNow as KUPPS migrates the invoice image and indexed detail into ImageNow.

To locate a Non-Catalog or Check Request invoice in WebNow:

1. Open WebNow. Using the provided link, open the KU WebNow site for tracking manual invoices. No special software is required as the WebNow tool is accessed through a web browser.
   1. Click on the Run button to run the WebNow application
   2. Type in the User Name (KU Portal ID)
   3. Type in the Password (KU Portal password)
   4. Click Connect

2. Expand the AP-Invoice Docs Option List. WebNow invoice records are indexed with detail information from the invoice. Click the + button to expand the list of search criteria options.

3. Select Search by Criteria. Click one of the Search by options:
   - Invoice – Invoice number
   - Invoice Amount – Exact amount of the invoice
   - Invoice Type – GOOD (goods); SERV (services); SUBC (subcontract); Check Request
   - PO – Purchase Order number from KUPPS (KU00012345)
   - Vendor ID – PeopleSoft Vendor ID number (10 digit)
   - Vendor Name – PeopleSoft Vendor name
   - Voucher – Voucher ID number. For check request invoices, the voucher number will be the same as the KUPPS PR number.

   After selecting search criteria, a pop-up window appears.

4. Enter Known Criteria. Type in the exact variable. WebNow does NOT accept partial information or wildcard fillers – complete detail must be entered. After entering the known variable, click the OK button.

   TIP – Click a different search criteria option if the Cancel button is used, or if no documents are found. This refreshes the WebNow Search by options.

5. Get Results. Double-click on the applicable search result line to open the WebNow Viewer in a new window.
5 Get Results. Review the invoice detail.

NOTE – Any annotation or other information entered and left on the WebNow record will remain part of that record.

WebNow View Tips
From the top toolbar, click-on View >
- Smooth – optimizes image resolution
- Properties – displays key indexed information of image
- Status Bar – provides status detail of image at bottom of view

WebNow Tool Tips
Click on the icons for the following review options:
B. Magnify/Reduce the document image.
C. Rotate the document image.
D. Fit window, width, or height of document in viewer window.
E. Hide/unhide annotation seen on document.
F. Navigate document when zoom is > 100% (click-hold-drag)
G. Add “sticky-note” to document.
H. Add Annotation to document.
I. Drawing tools to emphasize details detail on document.
J. Page navigation tools when document is more than one page.
The WebNow interface to ImageNow does not provide a direct option to print an invoice on paper. These steps illustrate the workaround option to print these invoice documents.

1. **Open The Invoice in WebNow.** Open the WebNow invoice document. See [Find a Check Request or Non-Catalog Invoice](#).

2. **Open WebNow Send To / Email Tool.** From the WebNow Viewer, click File >> Send To >> E-Mail to open the E-mail pop-up window.

3. **Send Image to Email.** Click the **OK** button. This launches a new email with an attached copy of the imaged invoice.tif file.

4. **Open the Image File.** Double-click the file attachment and then click the **Open** button to launch the image viewer.

5. **Open the Viewer Print Tool.** Using the image viewer print options, open the print tool.

6. **Send File to Print.** Identify the correct printer, and click the **Print** button.
KUPPS

User Guides for Overall P2P Processes

- Overall Process Map
- Catalog Process Map
- Non-catalog Process Map
- Check Request Process Map
- Refund Request Process Map
Overall Purchasing Process Guide

KUPPS Roles

- **Requestor**
  - Can create shopping carts & primarily responsible for submitting the requisition
- **Shopper**
  - Create the shopping cart
- **Approver**
  - Approval of requisitions

Process

- **Order**
  - Catalog
  - Non-Catalog
  - Check Request
- **Requisition**
  - Normal Order
  - Special Order

Issue Occurs

- Issue occurs during any of these processes and order turns to the requestor

Contacts

~KUPPS Contacts~
KUPPS Staff:
(785) 864-6136
(785) 864-3098
KUPPS Student Workers:
(785) 864-5799

~Purchasing Contacts~
General:
(785) 864-5800

~Payables Contacts~
General:
(785) 864-3790
Catalog Purchasing Process Guide

KUPPS Roles

- Requestor
  - Can create shopping carts & primarily responsible for submitting the requisition

- Shopper
  - = Create the shopping cart

- Approver
  - = Approval of requisitions

Process

- Catalog Order
  - Hosted Catalog
    - Catalog
    - Draft Cart
      - Doing Business As: KURES
      - Doing Business As: UKANS
    - Requisition

Issue Occurs

- = Issue occurs during any of these processes and order turns to the requestor

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~Purchasing Contacts~
- General:
  - (785) 864-5800

~Payables Contacts~
- General:
  - (785) 864-3790

KUPPS Roles

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  - = Can create shopping carts & primarily responsible for submitting the requisition

- Shopper
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- Approver
  - = Approval of requisitions

Process

- Catalog Order
  - Hosted Catalog
    - Catalog
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~Payables Contacts~
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KUPPS Roles

- Requestor
  - = Can create shopping carts & primarily responsible for submitting the requisition

- Shopper
  - = Create the shopping cart

- Approver
  - = Approval of requisitions

Process

- Catalog Order
  - Hosted Catalog
    - Catalog
    - Draft Cart
      - Doing Business As: KURES
      - Doing Business As: UKANS
    - Requisition

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- General:
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~Payables Contacts~
- General:
  - (785) 864-3790
Non-Catalog Purchasing Process Guide

KUPPS Roles

- Requestor: Can create shopping carts & primarily responsible for submitting the requisition
- Shopper: Create the shopping cart
- Approver: Approval of requisitions

Process

- Non-Catalog Order
  - Non-Catalog Form
  - Draft Cart
  - Doing Business As: UKANS
  - Doing Business As: KURES

- Requisition

Issue Occurs

- Issue occurs during any of these processes and order turns to the requestor

Contacts

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KUPPS Staff:
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(785) 864-3098
KUPPS Student Workers:
(785) 864-5799

~Purchasing Contacts~
General:
(785) 864-5800

~Payables Contacts~
General:
(785) 864-3790

Vendors must be held within KUPPS. If not:
- Vendor in PeopleSoft → Fill out and submit Change Vendor Form. Choose option Sync to KUPPS.
- Vendor not in PeopleSoft → Add vendor to PeopleSoft and sync to KUPPS

KUPPS Roles

- Requestor
- Shopper
- Approver

Process

- Non-Catalog Order
  - Non-Catalog Form
  - Draft Cart
  - Doing Business As: UKANS
  - Doing Business As: KURES

- Requisition

Issue Occurs

- Issue occurs during any of these processes and order turns to the requestor

Contacts

~KUPPS Contacts~
KUPPS Staff:
(785) 864-6136
(785) 864-3098
KUPPS Student Workers:
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~Purchasing Contacts~
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(785) 864-5800

~Payables Contacts~
General:
(785) 864-3790

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- Vendor in PeopleSoft → Fill out and submit Change Vendor Form. Choose option Sync to KUPPS.
- Vendor not in PeopleSoft → Add vendor to PeopleSoft and sync to KUPPS
Check Request Process Guide

KUPPS Roles

Process

Contacts

**“KUPPS Contacts”**
KUPPS Staff:
(785) 864-6136
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KUPPS Student Workers:
(785) 864-5799

~KUPPS Contacts~
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(785) 864-3098
KUPPS Student Workers:
(785) 864-5799

~Purchasing Contacts~
General:
(785) 864-5800

~Payables Contacts~
General:
(785) 864-3790
Refund Request Process Guide

KUPPS Roles

- Requestor: Can create shopping carts & primarily responsible for submitting the requisition
- Shopper: Create the shopping cart
- Approver: Approval of requisitions
- Bursars Reviewer: Review PO for correct revenue account

KUPPS Staff:
- (785) 864-6136
- (785) 864-3098

KUPPS Student Workers:
- (785) 864-5799

Process

Refund Request

Draft Cart

- Doing Business As- UKANS
- Doing Business As- KURES

Requisition

Issue Occurs
- Issue occurs during any of these processes and order turns to the requestor

Account Validation 1

Account Validation 2

UKANS Self-Approval
- Allows the user to skip the approval step

Contacting

- There is a need for a refund to be administered

Contacts

~KUPPS Contacts~
- KUPPS Staff:
  - (785) 864-6136
  - (785) 864-3098
- KUPPS Student Workers:
  - (785) 864-5799

~Purchasing Contacts~
- General:
  - (785) 864-5800
  - Approvals are driven by Department of Project chartfield
  - Special approvals systematically driven for:
    - Equipment, IT Hardware / Software and Prior Authorizations (PA)

~Payables Contacts~
- General:
  - (785) 864-3790
  - Correct address and bank information
• Change Order Requests
• Reviewing Contracts
• Changing Notification Settings
• Tutorial on DEMIS PO Activity Reports
• Locating DEMIS PO Activity Reports
• Requesting Access to KUPPS
• Technical Problems When Using KUPPS
User Guides on KUPPS Change Order Requests

- When to Submit PO Change Order Requests
- How to Submit PO Change Order Requests
Why PO Change Orders are Required

The KU Procure to Pay (P2P) integration between KUPPS and FSKU upgraded on June 25, 2012. The integration builds PO’s in FSKU from PO’s in KUPPS, resulting in PO Vouchers in FSKU. This provides budgetary encumbrances shown in DEMIS reporting.

Editing PeopleSoft PO and PO Vouchers will be performed by central office staff, but the change must be requested by department staff.

Reasons to Submit a KUPPS PO Change Order Request

- To change quantity, when reducing items ordered or for match exceptions
- To change amount or price on non-catalog orders
- To cancel a PO
- To change a KUCR subcontract
- Credit Memo processing for UKANS business unit transactions

Do NOT submit a PO Change Order

- To add products to a Catalog Order (Punch-Out). A quantity increase would be accomplished by placing a new order
- If any payment has been made against the PO, a journal request change (JRC) required to adjust funding
- To change a chartfield distribution or funding (account, department, fund, project, etc.) use a JRC.

For detailed instructions, see How to Create a PO Change Order Request.
PO Change Order Requests are submitted through KUPPS requisitions. These requisitions do NOT result in a new KUPPS PO. The PO Change Order requisition is a vehicle to communicate a request to the KUPPS Helpdesk that requires workflow approvals.

Click here to learn more about KU PO Change Order Requests.

To submit a PO Change Order Request (7 Steps):

1. Locate and open the Applicable Purchase Order.
   
   Identify the PO (KU00012345) using either:
   - a. the direct Search for tool; or
   - b. the document history search

   Click the PO number to open the PO document.

2. Navigate to the Associated Requisition.

   From the Status tab, click on the Requisition Number of the PO. This action opens the original purchase requisition (PR.)

3. Copy PR to a New Cart.

   From the Available Actions drop-down list, select Copy to New Cart and click the Go button.
4 Remove all Items from New Cart.

From the Shopping Cart, choose Remove All Items from the drop-down menu options. Click the Go button.

This step captures many of the data elements found in the PO requiring the Change Order Request and minimizes the need for subsequent duplicate entry.

5 Select and Complete Change Order Request Form.

From the Shopping Cart:
1. Click on the forms tab to open the KU Forms page.
2. Click Change Order Request from the Shared list option.
3. Click on the KUPPS PO Change Order Request option. This opens the Change Order Request form.
4. Complete all required Change Order Information. Provide a clear and comprehensive description of the change requirements.
5. In the Available Actions drop-down list, select Add and go to Cart and click the button.

These actions populate the draft shopping cart with the PO Change Order Request form. To edit the details of the request, click on the line item product description, Change Order Request, to reopen the form.

From the draft Shopping Cart, click the Review Requisition button.

NOTE – Accounting Codes (Funding) Changes – Journal Request Change (JRC) Form

A JRC is used when an Accounting Code chartfield change is required on a purchase order made through KUPPS. This includes: Business Unit; Speedchart; Account; Fund; Department; Project; Chartfield1; KUEA Account; KURES Department Reimbursable; or KURES Project Reimbursable;

University of Kansas or KU Research Form

UKANS transactions use the web form found on the Comptroller FACC website.

KURES transactions use a Cost Transfer Form for sponsored projects and a Journal Request Form for non-sponsored projects. These forms are found on the KUCR website.
Transition to Draft Requisition - Make Appropriate Changes.

Within the Draft Requisition, ensure all fields are complete and accurately represent the change request. Specifically:

- Ensure all changes are demonstrated in the Accounting Codes. The Department or Project must be correct.
- Ensure the instructions in the change request description agrees with the information in the Accounting Codes field.
- Review the workflow approvers to verify the request will be approved by the correct KUPPS Approvers. (*See below for workflow approval review steps.)

Submit for Department / PI Delegate Approval.

Once all updates are complete and the workflow has been verified, click the Submit Requisition for Approval button.

Once the requisition is approved by the applicable department or PI approver(s), it will workflow to the KUPPS Helpdesk for review and processing. Applicable updates to a KUPPS PO will migrate to the FSKU PO.

*Workflow Approval Review
1. Click the PR Approvals tab
2. Click view approvers
3. Verify the Workflow Step Approvers
KU purchasing contracts are available for review through KUPPS. KUPPS users and non-KUPPS users can access this information.

**1A Access Contract Detail with Existing KUPPS Profile.**

Login to KUPPS. From the homepage, click the **contracts** link or use the Search for Contracts tool. This opens the Contract Search page.

**OR**

**1B Access Contract Detail with CVIEWER.**

Open the KU Purchasing Service website – [www.purchasing.ku.edu/](http://www.purchasing.ku.edu/). Click **Contracts-KU**. This link provides you access to state and KU contracts.

This action opens the direct KUPPS **SIGN IN** page.

**2B Sign In to KUPPS with CVIEWER Profile.**

From the KUPPS **SIGN IN** page type in **CVIEWER** in both the User Name and Password fields. Use ALL CAPITAL letters.

Click the **SIGN IN** button.

The KUPPS Contract Search page will now open.
Choose Quick Search or Advance Search. The KUPPS contract search tool allows users to search for contracts using a simplified quick search filter or the advanced search options. Click on the link to select the preferred search filter tool.

Quick Search options. When using this filter:
1. Type in general search terms (supplier name, contract name, contract number, etc.)
2. Click the Search button to create the contract search results list.

Advanced Search options. When using this filter:
1. Refine the search options using any combination of the following filters:
   - **Contract Number** – This is an exact filter – it only returns contract numbers that match the search string exactly.
   - **Contract Type** – Select one of the drop-down options to locate contracts categorized as one of the following:
     A. Cooperative
     B. E&I Cooperative
     C. Kansas state contract
     D. KU contract
   - **Contract Keyword** – This is an exact filter – the text entered must match a keyword exactly. For example, the search string "photo" would not match the keyword "Photographer".
   - **Contract Status** – Select one of the drop-down options to locate contracts categorized as one of the following:
     A. Blank (no filter)
     B. Active
     C. Canceled
     D. Expired
     E. On Hold
     F. Under Negotiation
   - **Supplier Name** – This filter is a starts with filter – it will return contracts whose suppliers' names begin with the search string.
   - **Supplier Class** – Select one of the drop-down options to locate contracts categorized as one of the following:
     A. Catalog Vendor
     B. Green Supplier
     C. Preferred Supplier
     D. Punch-out Supplier supports cart copy
     E. Science Catalog Supplier
2. Click the Search button to create the contract search results list.
5. **Select Contract from Contract Search Results List.** The KUPPS contract result page will list all contracts that meet the search criteria. Click on the contract number to open the contract summary.

6. **Review the Contract Summary – Open Full Contract Record.** Summary details are immediately provided as shown in the illustration. To access the full contract record, under Details, click on the Contract soft copy link, **Contract.** The link will open as either:
   A. A PDF file of the actual KU contract.
   B. A PDF file of an external contract used by the University.
   C. A web page on an external site that provides access to the details of the contract. This includes State of Kansas purchasing contracts and some consortium contracts used by the University.
Notification Settings

The email notification and accounting code defaults in KUPPS can be customized to the preference of individual users. This requires a change in the user profile.

1 Email Preferences. KUPPS is configured to send email notifications in response to different events. Users can control if certain email notices are sent. To change an email setting:

1. Navigate to Profile >> User Settings >> Email Preferences.
2. Click on the dropdown box.
3. Set the dropdown box to your preference (Email, Notification, Email & Notification).
4. Click the Save button when done.

To determine what event triggers an email notice, hover over the title of the notification and a help box window will appear that defines when the notice is sent.

2 Default Accounting Codes. KUPPS users can preset default accounting codes that will populate each new requisition. These defaults are typically most useful for KUPPS users that do not regularly work with university accounting codes and make repeat orders. To create default accounting code favorites:

1. Navigate to Profiles >> Purchasing >> Custom Fields >> Code Favorites.
2. Click the Add button.
3. This opens the Accounting Codes edit tool.
   • Give the default setting a Nickname.
   • Check the Default checkbox.
   • Enter all default accounting code values.
   • Click the Save button.
4. Verify the settings for the default accounting codes are correct. Click the Edit button to change the saved settings as necessary.

All future will requisitions will now automatically populate the default accounting code values set for the user. If the default accounting codes are not correct for a particular requisition, anyone within the workflow can update the code settings from within the requisition.
Section I: Saving Reports

1.) For First time users: Click File > Save As.
2.) Select folder ‘My Folder’ (a) using the drop down arrow; Make sure type is set to ‘Data is automatically refreshed’ (b); Then click the Save button (c) and click ‘Portal’ to return to the home screen (d).

3.) In the top left corner click on the ‘Home’ tab (e) and click on the ‘Edit Content’ icon (f).
4.) Select ‘Add Items...’ (h).

First time users will not see anything under the ‘Items’ Section.

5.) Click the ‘Search’ tab (i).
6.) Type ‘PO Activity Report’ into the search box (j) and check the ‘SAS Report’ Box (k); Click the ‘Search’ button (l).

7.) Check the box with Location: ‘/Users/*user_name*/MyFolder’ (m); Click the ‘Add’ button (n); Make sure to click ‘Done’ to save reports (o).
8.) After clicking ‘Done’, select ‘Ok’.

9.) ‘PO Activity Reports’ should now show up under ‘Home’ Tab on portal screen.

Note: You can reopen a report from the Home tab. To use your previous selection, remember to open from your Home tab.

10.) To save your parameters, remember to click on the Save button before exiting.
Section II: Basics of Running a Report

Note: If you are accessing a previous report it is easiest to do so through the Home tab as discussed above. If you are starting a new report follow these steps.

1.) After Accessing “Financials” Link, Select “PO Activity Report.srx”

2.) Select from Options to run Report.

Note: Drop Down Menus are available for the dates.
Note: **All** parameters must contain a selected value or an error message will occur.

Note: It is **strongly** suggested to select a vendor and reasonable date range in order to avoid unnecessarily long reports.
Note: There are additional rows of ‘PO IDs’ and ‘Vendors’ that you can select from. You can access other rows by clicking on the blue arrows above the boxes.

3.) Select the “PO IDS” and the “Vendors” using the blue arrows.

You can also return to previous rows by clicking on the blue arrows.

Once selected (using the blue arrow), the values move over into the ‘Selected’ box.
Note: If you no longer want a value in the selected box then you can unselect the value by clicking the value and then the ‘X’ button.

Note: A value must be selected, but you may select the option ‘all possible values’.
Note: You can click on the ‘Reset to Default’ button at any time. This will unselect all of your previous selections.

4.) After selecting desired criteria, click the ‘View Report’ button.

Note: Once the report appears on the screen there will be a ‘Table of Contents’ menu on the left-hand side. There is a Drop Down Menu where you can change the report parameters. This will be explained below.
1.) The report will open under ‘Summarize PO Rpt’. All of the report will be summarized by PO ID.

2.) To switch the parameters click the Drop Down Menu under the ‘Table of Contents’; Click on ‘Detail report, Sum by PO’.
2a.) Once you have changed the parameters, it will take you back to the ‘Options’ screen. You may change the values, or you may simply click on the ‘View Report’ button.

2b.) Once you click ‘View Report’, you will be able to view the reports in more detail.
Note: Another way to view a specific report is to click on the PO ID while under the ‘Summarize PO Rpt’ section.

3.) To switch the parameters click the Drop Down Menu under the ‘Table of Contents’; click on ‘Group By Vendor’.
3a.) Once you select ‘Group By Vendor’, it will take you back to the ‘Options’ screen; here you can narrow your data even further by department, project ID, fund code, vendor, and date. Note: You do not have to make any additional selections in this section; you may just click the ‘View Report’ button at the bottom of the page.

4.) To switch the parameters click the Drop Down Menu under the ‘Table of Contents’; click on ‘Vendor Pie Chart’.
4a.) Once you select ‘Vendor Pie Chart’, it will take you back to the ‘Options’ screen; here you can narrow your data even further by PO ID, vendor, department, project ID, fund code, and date.

Note: You do **not** have to make any additional selections in this section; you may just click the ‘View Report’ button at the bottom of the page.
5.) To refresh report’s data after selecting Parameters: Select “Data” and “Refresh Data”.

** The refresh is related to the table of contents menu item selected. If you want to select new filters parameters, move to Select Parameters.

Section III: Setting Print Options

Please note: the only output option is PDF. These are fixed format reports, as requested. To export or download data, please use regular DEMIS Financial reports.

1.) To adjust formatting for printing, select “File” “Page Setup”
2.) To print, click on the printer icon. (Be sure to use the Report Menu bar and not the Browser menu bar.)

3.) The browser print window will popup. Leave the print range as it defaults, *Current page*, then click on the “Print to PDF”… button.

Note: An orphan *blank* browser window may open, then the PDF viewer will open. If you don’t see the PDF window, look on you Windows task bar for the Adobe Icon and select it.

You will need to manually close the orphan browser window.
The KU Office of Institutional Research and Planning (OIRP) provides a PO Activity Report in DEMIS that tracks PO encumbrances and payment activity. This guide provides basic instruction on accessing and using the DEMIS PO Activity Report.

Click here for the full OIRP Tutorial on the DEMIS PO Activity Report.

1. **Log On To DEMIS.** Access to DEMIS is managed through OIRP. Click here to open the DEMIS Log On page. Type in the applicable User name and Password and click the button.

2. **Open the Report Tool.** After the DEMIS Portal opens:
   1. Click on the Financials tab.
   2. Click on the PO Activity Report.srx option.

3. **Clear the Tool and Open PO Search Options.**
   1. If there is pre-existing data already in the Selected: list, click on the number item and click the button to remove it.
   2. Click on the search icon to launch the PO search tool to load applicable PO numbers into the report.
4 Enter PO Numbers for the Search.
   1. In the Search for Items that: dropdown tool, select Contains.
   2. Type in the full 10-digit PO number (KU00012345).
   3. Click the Search button.
   4. Click the button to load the PO into the Selected: list.

5 Load PO Numbers for the Search.
   1. Click the button to populate the selected PO number(s) to the main report search tool.
   2. Click on the button.

6 Review PO Report summaries. PO Lifecycle Summary Reports will now display for each PO identified in step 4. The following examples are illustrated:
   A. Fully Invoiced and Paid PO – Encumbrance Fully Relieved
   B. Un-invoiced PO – Full Encumbrance Remains
   C. Partially Invoiced and Paid PO – Encumbrance Partially Relieved

7 Report Type Options. The following report options are also available. Click on the drop-down tool to select from:
   - Summarize PO Rpt (default report that is illustrated)
   - Detail report, Sum by PO
   - Group By Vendor
   - Vendor Pie Chart

8 Add Data Dynamically. Additional columns of data can be added to the report dynamically. From the list of options under the Fin_Transaction_Map list, drag and drop additional criteria into the report as is desired.
Access Request Forms are needed in order for a user to receive access to the KUPPS system. Below is the link to the Request Form as well as the steps to fill it out.

1. Follow the Link Listed Below. [http://www.comptroller.ku.edu/financial_systems_administration/access_to_fsku/general_information.aspx](http://www.comptroller.ku.edu/financial_systems_administration/access_to_fsku/general_information.aspx)

2. Once on the Financial Systems Administration page, click the blue words that say request form.

3. Fill out the required information.

4. Check the box for whichever role you would like the user to receive:
   - **KUPPS Shopper**: This role is for users who will be shopping in the KUPPS system.
   - **KUPPS Requestor**: This role is for users who will be completing the financial information.
   - **KUPPS Approver**: This role is for users who will be approving requisitions.

5. Print off the form and get the required signatures. Then scan this document and email it to FSKU@ku.edu.
Technical Problems When Using KUPPS

There are a variety of technical issues that KUPPS users may encounter that prevent them from using the KUPPS system. Here are some common issues and how to fix them.

**Are you having trouble redirecting to a Punch-Out vendors website?**

- This can usually be fixed by clearing out the cache on your browser.
- Here is a link to the KU Privacy Office guide on how to clear your browser’s cache: [http://privacy.ku.edu/clear-cache](http://privacy.ku.edu/clear-cache)

**Are you having trouble loading tools on the Punch-Out vendors website?**

- Not all vendor websites work well within every browser.
- KU Information Technology recommends using Mozilla Firefox as your default browser, as it has the least amount of problems with third party websites.
- If you do not currently have Mozilla Firefox installed on your computer, contact a member of your departmental IT staff to have it installed.

**Are the buttons on the Punch-Out vendor website not working?**

- This is usually caused by not having up-to-date browser plug-ins (example: Java).
- Contact a member of your departmental IT staff to assist you with updating your browser plug-ins.

**Are you having problems logging into the KUPPS system through the myKU portal?**

- This is usually an issue with the myKU portal and can be resolved by contacting KU IT Services.
  - Website: [http://technology.ku.edu/](http://technology.ku.edu/)
  - Email: ITService@ku.edu
  - Phone: 785-864-8080