

UConn Sponsored Program Services
Submitting a Requisition in Quali Financial System
(Subawards & Consulting Agreements)

Main Menu → Transactions → Purchasing/Accounts Payable → Requisition

- Document Overview Tab
 - o Description: Enter a description for the requisition, please include vendor name → *click **save** at the bottom of the screen*
 - o Organization Document Number: optional
 - o Explanation: optional; but you can enter information related to agreement/subaward/consulting agreement
 - o Funding Source: Institute Account
 - o Account Distribution Method: Proportional
 - o **Payment Request Positive Approval Required: check box**

Note: once you click on the save button the document has now been assigned a requisition number

- Delivery Tab
 - o Set default building address by clicking on the **magnifying glass**; search for the building code, return the value and then save by clicking **set as default building**
 - o KFS will recognize you based on the NetID and the building will auto populate each time a requisition is created. This information can be changed if necessary
 - o Search for receiving address and return the value; receiving address will be your department name and address
- Vendor Tab
 - o Search for Vendor by clicking on the **magnifying glass**; on vendor look up screen, use (*) to get more results → click on **return value** next to the vendor you want to do business with
 - If the vendor you want to use does not come up in your search results you will have to complete a vendor create e-doc
 - o If vendor address is not correct, click magnifying glass to go to vendor address lookup screen and allow you to pick an alternate address
 - o *Note: do not enter a fax number*
- Items Tab
 - o Item Line
 - Enter No Quantity
 - Enter Commodity Code → 402 for Subawards or 133 for Consulting Agreements
 - Enter Description
 - Enter Unit Cost
 - Click **add**
 - o Accounting Lines
 - Enter Chart Code → UC
 - Enter Account Number
 - Enter Object Code → Subaward [6603 & 6604] or Consulting Agreement [6638 or 7650 (travel)]
 - Enter Percent → 100.00
 - Click **add**
 - o *Note: a new item line must be added for each object code. [example: The first \$25,000 for a subaward agreement will go in one item line using 6603, the remaining funds will go in another item line using 6604. Use 100 percent for both item lines/accounting lines.]*
- Payment Info Tab
 - o Type of Recurring Payment: Variable Schedule, Variable Amount
 - o Begin/End Date: dates on agreement
- Click **calculate** at the bottom of the screen
- Click **submit** at the bottom of the screen → you will get a message at the top that says your document was successfully submitted

Requisition

Doc Nbr:	1260818	Status:	INITIATED
Initiator:	jep02010	Created:	02:39 PM 12/04/2014
Requisition #:	Not Available	Requisition Status:	In Process

expand all collapse all
* required field

Document Overview

* Description:		Explanation:
Organization Document Number:		
* Year: 2015		Total Amount:
Requisition Detail		
Chart/Org:	UC / 1345	* Funding Source: Institution Account
Receiving Required:	<input type="checkbox"/>	Account Distribution Method: Proportional
Use Tax Indicator:	Yes	Payment Request Positive Approval Required: <input checked="" type="checkbox"/>

Please be sure to check this box

Delivery

Final Delivery

* Delivery Campus:	01 - Storrs	* Delivery To:	Jennifer M Johnson
Building:	building not found set as default building	Phone Number:	860-486-4293
* Address 1:		Email:	jennifer.johnson@uconn.edu
Address 2:		Date Required:	
* Room:		Date Required Reason:	
* City:		Delivery Instructions:	
State:			
Postal Code:			
* Country:			

Receiving Address

* Receiving Address:	Sponsored Programs, Office Of 438 Whitney Rd Ext. Unit 1133 Storrs, CT 06269-1133 United States
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Address To Vendor

Use Receiving Address as Shipping Address Presented to Vendor?	Yes
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Vendor

Vendor Address