Creating a Requisition from a SuperQuote Award User Guide
Introduction

The KFS SuperQUOTE (SQ) Awards feature allows users to automatically populate a Requisition (REQS) with information from a quotation awarded via CommercePoint’s SuperQUOTE system.

By clicking the SuperQUOTE Awards link, users can view a list of available Award numbers. Default results are based on the Fiscal Office (FO) code assigned to the user’s primary department code. The FO Code may be manually changed if needed. Select the desired award number and the system will automatically populate a KFS Requisition, eliminating the need to re-enter the order information.

This user guide provides instructions on how to search for and select the desired SuperQUOTE Award number and then create a KFS Requisition for further processing.

UH Procedures and Recommendations

To ensure the financially responsible spending of taxpayer dollars, the University seeks to award competitively solicited contracts to vendors that provide the best pricing. The acquisition of goods, services and construction in amounts less than $5,000 are informally solicited, while small purchases of goods and services from $5,000 to less than $100,000 and construction services from $15,000 to less than $250,000 are solicited via SuperQUOTE, the electronic on-line request for quotations system. In addition, purchase of construction services of $5,000 to less than $15,000 are solicited via written quotes, however, SuperQUOTE may also be utilized.

For more information regarding the University’s small purchase procedures, solicitation requirements, exceptions to solicitation requirements, and a link to the SuperQUOTE system, please see:

- The Office of Procurement Management’s website - https://www.hawaii.edu/procurement
- UH Systemwide Policies and Procedures Information System (PPIS), Administrative Procedures Chapter 8 Business and Finance:
  - AP 8.250 Small Purchase – Goods and Services
  - AP 8.281 Construction and Professional Services in Support of Construction
- To access the SuperQUOTE system, prospective users should contact their departmental business office staff to establish a user profile under the department’s SuperQUOTE account, and if needed, to register for a CommercePoint training session.

Getting Started In KFS

- Upon completion of the solicitation process and selection of the awarded vendor in SuperQUOTE, the system will feed the award data to KFS.
- The award number may then be accessed in KFS to create and populate a KFS Requisition document.
  - The award number is the same as the SuperQUOTE Request number.
- NOTE: SuperQUOTE transmits award data approximately every 15 minutes.

This guide is not intended to duplicate the Creating a Requisition User Guide, only to describe the parts of the process that are unique to creating a SuperQuote REQS. For general information on creating a Requisition in KFS, please refer to the Creating a Requisition User Guide.

For more information about the standard document header, tabs, and workflow action buttons, please refer to the Standard KFS eDoc Layout User Guide.
Creating a Requisition from a SuperQUOTe Award

To create a SuperQUOTe Requisition, go to the KFS Main Menu tab and click on the SuperQUOTe Awards link.

Main Menu tab → Transactions → Purchasing/Accounts Payable → SuperQUOTe Awards

The system will advance to the SuperQUOTe Lookup page.
The Initiator’s default Fiscal Office (FO) Code will be populated in the Fiscal Office Code field and a list of related SQ Awards will be displayed. The FO Code may also be changed to search for SQ Awards under a different FO Code.

Use the Award Number and Fiscal Office Code fields to widen or narrow your search, then click the ‘search’ button.

- **NOTE:** The wildcard (*) may also be used to search using a partial award number.

The system will return applicable SQ Awards that were fed to KFS from SuperQUOTE.

**NOTE:** When searching by award or partial award number, awards for which REQS have already been created and saved will also be displayed with a link to view the REQS.

You may also search by the exact award number, if known.
Kuali Financial System
User Guide – Creating a Requisition from a SuperQuote Award

- From the Actions column, select the desired award number.
- The system will automatically create a REQS and populate applicable fields with pertinent data from the SQ Award.

1. **Description** – (Required) Enter the 3-digit FO Code followed by a brief description for the document (limited to 40 characters).
   - Minimally, the description is needed to save your REQS.
   - Check with your business office for your department’s standard procedure.

2. **Organization Document Number** - KFS populates the SQ award number here, starting with “SQ” then the award number. It may also be manually changed (limited to 10 characters).
   - If manually changed, the SQ award number can also be found in the system generated note text in the Notes and Attachments tab for future reference.
   - NOTE: Neither the Organization Document Number or the Note Text fields print on the hardcopy Purchase Order (PO). If the SQ Award Number should be transmitted to the vendor on the hardcopy
3. **Explanation** - KFS populates the SQ Requisitioner’s name and the other vendor quotes received. If no other quotes were received, “No other quotes” will be displayed (limited to 400 characters).

4. **Suggested Vendor – (Recommended)** KFS populates the awarded vendor’s name and address, as entered on their SQ bid. A KFS vendor record still needs to be selected in order to finalize the PO. After saving the REQS, the lookup tool will be available to find and return the corresponding vendor record and populate the Vendor #.
   - **NOTE:** If a Vendor record does not currently exist in the system or data must be updated, you may need to either create a new vendor or edit an existing vendor record. For instructions on how to create or edit a Vendor record, refer to the [Vendor Maintenance User Guide](#), or contact your business office for assistance.
   - KFS does not require completion of the Vendor fields in order to finalize the Requisition; however a valid vendor record is required to finalize the PO. Quotes may have an expiration date, therefore to facilitate the order process it is recommended that a valid Vendor record is selected on the Requisition.

After save, the magnifying glass icon is available to search for and return the appropriate vendor record.

After the vendor record is selected, the Vendor # is populated and a ‘clear vendor’ button is available if the incorrect vendor was selected.
5. All numbered items on the SQ bid (see Item List section of a sample SQ bid below) are transferred to the REQS as item lines with Item Type = QUANTITY. The quantity is transferred from the SQ bid and UOM defaults to EA.

- In general, NO QUANTITY is recommended as it allows greater flexibility at time of payment, especially for partial payments and for liquidation of the encumbrance. QUANTITY may be used when a single quantity item will be ordered and single payment made. Consult your business office for your department’s recommendations.
• You may manually change the Item Type to NO QUANTITY and delete the data in the Quantity and UOM fields. **IMPORTANT:** If you change the Item Type from QUANTITY to NO QUANTITY, you must also replace the original Unit Cost with the Extended (Total) Cost for the line so that the total amount remains the same.
  o NOTE: You may also want to indicate in the item description, Quantity x Unit Cost = Total Cost so the order details are clear for the vendor.
• Data in Item Line Description fields are populated without formatting, and truncated if longer than 4,000 characters. Remember to review the line descriptions and edit as necessary, so it clearly states order details.

6. Other items on the SQ bid (Misc charges, Taxes and Freight) are also transferred to the REQS as item lines. These items do not have a quantity on the SQ bid, so on the REQS they are Item Type = NO QUANTITY and the Quantity and UOM fields are blank.

7. Additional Charge Lines are not automatically populated. Freight and Miscellaneous charges are transferred from the SQ bid to the REQS as Item Lines. These charges may be manually moved to the Additional Charge Lines if desired.
  o NOTE: Check with your business office for your department’s recommendation regarding use of the Additional Charge Lines vs. Item Lines for these types of charges.

8. **Accounting Line(s) – (Required)** Accounting lines need to be added on the REQS. No account information is entered in SuperQUOTE, thus it cannot be transferred from the SQ award to the KFS REQS.

9. **Notes and Attachments**
  • When a REQS is created using the SuperQUOTE Awards link, KFS inserts a system generated note, “Requisition created from SuperQUOTE number XXXXXX. Requisition created from SuperQUOTE award XXXXX.”
    o This system generated note with Author “KFSSYS”, is the easiest way to tell if a REQS was created from the SuperQUOTE Awards link. If an SQ REQS is copied, the new copy will not have this system generated note.
    o NOTE: You cannot copy this note verbatim and add it to a different REQS. The system will return an error since users should not be creating multiple REQS from a single SQ Award - “A new Requisition cannot be saved from Super QUOTE Award XXXXX, because a Requisition has already been created from it. Please see document XXXXXXX.” If the original SQ REQS was disapproved or otherwise cannot be used and needs to be copied to a new REQS, you may simply alter the KFSSYS note slightly to avoid getting the error.
  • Attach any required supporting documents. Requirements may vary based on the details of your order; check with your business office for a list of supporting documents required for your SQ REQS.

To confirm the accuracy of data transferred to the KFS REQS, verify the details against the applicable SuperQUOTE Award document.
From: Operations and Maintenance  
UH-Maui College  
310 Kaahumanu Ave  
Kahului, HI 96732

UNIVERSITY OF HAWAII  
REQUEST FOR QUOTATION  
THIS IS NOT AN ORDER  
(THESE QUOTATIONS IMPLY NO OBLIGATION TO  
BUY ON THE PART OF THE BUYING GROUP)  
BIDS ARE SUBJECT TO TERMS & CONDITIONS AS ATTACHED HERETO.

Request Type: REQUEST FOR QUOTATION  
Open Date: Jul/8/19 at: 16:00  
Request #: 91251  
Close Date: Jul/31/19 at: 18:00  
Shipping To:  
Robert E. Burton  
Tel: 808-984-3245  
Email: reburton@hawaii.edu  
Fax: 808-984-3200  
UH-Maui College  
310 W. Kaahumanu Ave  
Kahului, HI, 96732

Vendor: Ventura Power Generation LLC  
5796 Lower Kula Road  
Kula HI 96790  
Tel: 808 298 0984  
Fax: 808 298 0984

If awarded, PO made out to: Ventura Power Generation LLC  
5796 Lower Kula Road  
Kula HI 96790

<table>
<thead>
<tr>
<th>Ship Via</th>
<th>To be shipped via</th>
<th>Date Required</th>
<th>Delivery can be made</th>
<th>Discount Terms</th>
<th>Quote valid for</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Oct/01/19</td>
<td>90</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Quote must include all taxes and applicable charges.  
2. Local service/support required due to nature of equipment being serviced. This emergency generating is outside of scope of maintenance contract:
   a) Regular and overtime rates for duration of contract.
   b) Contractor will provide written quote for all identified non emergency & emergency repairs within 10 business days from the date of service.
   c) There is also an area in the commerciopt doc that can be changed to indicate 90 DAYS.
   MAHALO!

Note to Buyer  
Maui based business for service/support. Regular rate $96 per hour plus tax, overtime rate is $144 per hour plus tax. Emergency service work at $150 per hour at a minimum of two hours charge. Special work performed for repairs will be an additional charge. All special order parts are to be prepaid by the customer. If diesel fuel is needed to refill fuel in tanks or drums this service and be provided at an extra cost. Quote is valid for 90 days.

Item List

<table>
<thead>
<tr>
<th>Item</th>
<th>Qty</th>
<th>Mfg. Name</th>
<th>Mfg. Part #</th>
<th>Vendor Description</th>
<th>Unit Price</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12</td>
<td></td>
<td></td>
<td>Equipment: (1) Caterpillar 900kW Generator Set and (1) Automatic Transfer Switch. MONTHLY Service of the Ka'ieke Bldg Emergency standby generator and Automatic Transfer Switch. Generator to be serviced, inspected, and tested monthly according to maintenance checklist. Transfer Switch to be maintained, serviced, and tested as required. Contract to cover all labor for maintenance including engine oil and filters. Service dates: October 1, 2019 - September 30, 2020</td>
<td>400</td>
<td>4800.00</td>
</tr>
</tbody>
</table>

Mise charges  
Taxes  
Freight  
Total - (Total Price must include ALL Applicable Shipping, Handling, and Taxes)  
4999.97
Important Notes:

- A SuperQUOTE award may only be transferred to a REQS once. Once the REQS is saved, the award cannot be used again. If the REQS is subsequently cancelled or disapproved, the “copy” feature can be used or a new REQS can be entered manually.

- The SuperQUOTE Lookup defaults to the user’s FO Code. However, the FO Code can be manually changed, and KFS does not restrict access to awards under other FO Codes. If an award number was clicked in error and a REQS was created:
  - Before the REQS is saved, you may exit the REQS eDoc (without saving) and the award will still be available in the SQ Lookup.
  - Once the REQS is saved, KFS will assign a Requisition # and remove the award from the SQ Lookup. If this happens, it is suggested that you notify the affected department of the error so that they may copy the erroneous REQS to a new document if needed.

- Delivery information (Delivery tab) and Requestor information (Additional Institutional Info tab) is populated with the KFS REQS Initiator’s information (NOT with SQ data).

- The Special Instructions and Notes to Buyer sections on the SQ bid, are not transferred to the KFS REQS. Any information from these sections that should be included on the REQS/PO should be manually added to the REQS.

- Data transferred from SuperQUOTE are populated on the REQS without formatting, and may also contain erroneous special characters. Remember to review the transferred data and edit as necessary, so order details are clearly stated.

- In general, Item Type NO QUANTITY is recommended. When changing Item Lines from Item Type QUANTITY to NO QUANTITY, you should include Quantity x Unit Price in the line description for reference.

- All SQ data transferred to the REQS, may be edited before submitting the REQS. However, since the goods and/or services were solicited competitively via SuperQUOTE, the overall order should not be altered. If you are uncertain whether a change is allowable, check with your business office.