The following table lists and describes each data field on the OLE Requisition eDoc. Data fields that have not been altered or added by the OLE project have definitions provided by the KFS user manual. The KFS User Manual describes the Requisition eDoc at http://testdrive.kfs.kuali.org/kfs-ptd/static/help/default.htm?turl=WordDocuments%2Frequisition.htm.

Document Header – completed automatically	
Doc Nbr	A unique, sequential, system-assigned number for a document
Status	Also known as Route Status. The current location of the document in its routing path.
Initiator	An OLE user role for a person who creates (initiates or authors) a new document for routing. Any Kuali user may initiate most of the document types, however, an Initiator may be required to belong to a Role for certain restricted document types (for example, Journal Voucher).
Created	The date on which a document is created
Requisition #	An identifying number assigned to this requisition. This number, which may be used for queries specific to the Purchasing/AP module of the OLE, differs from the Doc Nbr, which identifies the requisition as a unique document for general OLE and Workflow queries.
Requisition Status	A status that indicates where in the Purchasing/AP process a requisition is at any given time. This is similar to the status a document receives in Workflow but is specific to the purchasing process. Examples of REQ Status might include 'Awaiting Fiscal Officer,' 'In Process,' and 'Closed'.
Document Overview Tab	
Description*	Required. Enter the short description for the document. The description appears in the GLGL Inquiry, standard reports, action list and document search a primary identification of the document.
Organization Document Number	Optional. Enter the value that may include departmental or organizational information. This number is not the same as the Document Number assigned by the OLE.
Explanation	Optional. Enter a more detailed explanation than the information supplied in the description field.
Financial Document Detail section	
Year*	Required. The default is the current fiscal year. this field is not editable until the 'ALLOW ENCUMBER NEXT FY DAYS' parameter has been met. Setting the year to the next fiscal year can affect the requisition in several ways. The requisition may not become an APO if the 'ALLOW APO NEXT FY DAYS' parameter has not been met, and the funds will not be encumbered until the next fiscal year

	once a PO is fully approved.
Total Amount	Display-only. Displays the total amount of accounting lines when the document is submitted successfully.
Requisition Detail section	
Chart/Org*	Required. Automatically completed based on the initiator's chart/org. This value may be changed manually via the lookup . This value is also the chart/org that is used for the Content route level.
Receiving Required	Optional. Select the check box to ignore the receiving thresholds on the approved purchase order. If the field is checked, then a Line Item Receiving document must be processed with sufficient quantities received before a payment will route to the fiscal officer.
Use Tax Indicator	Required if the 'ENABLE SALES TAX IND' parameter is set to 'Y,' Otherwise, this field does not display at all. Indicates whether or not sales or use tax applies to the **requisition**.
Order Type	Identifies the type of order, possible values could be one-time, standing, subscription. System default data value is "Firm, Fixed".
Funding Source*	Required. Defaults to 'Institution Account'. May be changed by selecting another option from the list.
Payment Request Approval Required	Optional. The 'DEFAULT POS APPRVL LMT' parameter determines the dollar limit where payment requests must receive positive approval from a fiscal officer. If this field is selected, positive approval on the payment request is required regardless of the total of the payment.
Delivery Tab	
Final Delivery section	
Delivery Campus*	Required. Defaults to the appropriate campus for the user's chart/org. You may also search for another campus from the **Delivery Campus** lookup .
Building*	Required. Search for the building to which goods should be delivered from the **building** lookup . Only buildings that correspond with the delivery campus will display. Selection of a building automatically completes the **Address**, **City**, **State** and **Postal Code** fields.
Address 1*	Required; automatically populated from data for the **Building** value. May be entered manually if the user selects the **Building Not Found** button.
Address 2	Optional. Entered manually if an additional line of address is needed.

Room*	Required. Enter the room number to which delivery should be made.
City*	Required; automatically populated from data for the **Building** value. May be entered manually if the user selects the **Building Not Found** button.
State*	Required; automatically populated from data for the **Building** value. May be entered manually if the user selects the **Building Not Found** button.
Postal Code*	Required; automatically populated from data for the **Building** value. May be entered manually if the user selects the **Building Not Found** button.
Country	Automatically populated from data for the **Building** value. May be entered manually if the user selects the **Building Not Found** button.
Delivery To*	Required. Defaults to the initiator's user name. You may enter another name or use the **User** lookup to find it.
Phone Number	Optional. Defaults to the initiator's user e-mail address but may be changed.
Email	Optional. Automatically populated from the initiator's phone number but may be changed.
Date Required	Optional. Enter a date on which delivery is required or choose the date from the calendar .
Date Required Reason	Optional. If a date required has been specified, select the appropriate date required reason from the list.
Delivery Instructions	Optional. Enter text describing any special delivery instructions for the item(s).
Receiving Address section	
Receiving Address	If this field does not display, it is because the 'ENABLE RECEIVING ADDRESS INDICATOR' parameter is set to 'N'. If it does display, the default is determined by the receiving address that has been set up for the initiator's organization. May be changed by using the lookup .
Address to Vendor section	
Shipping Address Presented to Vendor	Defaults to the receiving address. May be changed to the final delivery address. NOTE: If this field is read-only, it is because the 'ENABLE ADDRESS TO VENDOR SELECTION INDICATOR' parameter

	is set to 'No'.
Vendor Tab	
Vendor Address section	
Suggested Vendor	Optional. Enter the name of a vendor that is able to fulfill this requisition or search for it from the **Vendor** lookup. Selecting a vendor from the table populates other fields in this tab based on the information already on file in OLE for this vendor. Alternately, you may select a contract (see below) and the vendor associated with that contract is automatically populated.
Vendor #	Display-only. Completed automatically when a suggested vendor is selected from the vendor table.
Address 1	Optional. Enter the first line of the address for the suggested vendor. If a vendor has been selected from the vendor table this field is automatically populated. If you want to select a different vendor address than the default, choose one of the addresses entered for this vendor from the **Address** lookup.
Address 2	Optional. Enter the second line of the address for the suggested vendor. If a vendor has been selected from the vendor table this field is automatically populated.
Attention	Optional. Enter the name of the person to whom the delivery is to be directed.
City	Optional. Enter the suggested vendor's city. If a vendor has been selected from the vendor table this field is automatically populated.
State	Optional. Enter the suggested vendor's state. If a vendor has been selected from the vendor table, this field is automatically populated.
Province	Optional. Enter the province if vendor is located outside of the United States.
Postal Code	Optional. Enter the selected vendor's postal code. If a vendor has been selected from the vendor table, this field is automatically populated.
Country	Optional. Enter the selected vendor's country. If a vendor has been selected from the vendor table, this field is automatically populated.
Vendor Info section	
Acquisition Unit's Vendor	Optional. Enter a customer number that identifies your

account / Vendor Info Customer #	institution or department for this vendor's reference or search for it from the **Customer Number** lookup .
Notes to Vendor	Optional. Include any text notes you want the vendor to see on the PO.
Contract Name	Optional. If a contract exists with the vendor for these goods or services, select one from the **Contract** lookup . Selecting a contract also populates the vendor associated with that contract. The contracts are campus-specific. A requisition returns results only for the campus associated with the Chart/Org found on the **Additional Institutional Info** tab (see below). Selecting a contract affects the APO limit, depending on how the contract has been set up for the organization. The APO limit is usually increased when a contract is selected.
Phone Number	Optional. If a vendor has been selected from the Vendor table, this field may automatically be populated or the **Phone Number** lookup will list all the Phone Numbers for this Vendor. The lookup is simply a convenience that allows you to view the phone number. It does not provide a **return value** link.
Fax Number	Optional. Enter the selected vendor's fax number. If a vendor has been selected from the vendor table, this field may automatically be populated.
Payment Terms	Display-only. If a vendor has been selected from the Vendor table or a contract, this field may be populated automatically.
Shipping Title	Display-only. If a vendor has been selected from the Vendor table or a contract, this field may be populated automatically.
Shipping Payment Terms	Display-only. If a vendor has been selected from the Vendor table or a contract, this field may be populated automatically.
Contacts	Optional. If a vendor has been selected from the Vendor table or a contract, the **Contact** lookup will list all the contacts for the vendor. The lookup is simply a convenience that allows you to view the contacts list. It does not provide a **return value** link.
Supplier Diversity	Display-only. If a vendor has been selected from the Vendor table or a contract, this field may be populated automatically.
Additional Suggested Vendor Names section	
Vendor Name (1-5)	Optional. Enter up to five additional suggested vendors that may be able to fulfill this requisition.
Titles Tab	
Add Item/Current Items section	
Item Line #	OLE assigns the item number when the **add** button is clicked.

	After a line is added, a number is assigned and the item number may be increased or decreased using the arrow buttons. 
Item Type*	Required. Select the type of item being specified on this line, such as 'Qty or 'No Qty'. The default is 'Qty'.
Quantity	Required if the **Item Type** value is 'Qty'. Enter the quantity of the item in this field. Quantity should not be entered for 'No Qty'.
No. of Parts	This is the number of individual pieces that must be accounted for upon payment/receipt of a requisitioned item. Not used when Item Type is "No Qty"
UOM	Required if the **Item Type** value is 'Qty'. Enter the UOM (unit of measure) or use the lookup to find the UOM.
Description*	Concatenated data values from the related bibliographic description.
List Price*	Basic price of an item before any discounts are taken.
Discount	Discount provided by the vendor/customer number/organization combination. Automatically populated from the Vendor customer number table based on the selected vendor and customer number. Can be modified for a specific title. If the vendor record has a Vendor currency noted other than the default system currency (aka US dollar), then the Vendor discount will populate the Foreign Discount field.
Discount Type	Choose # (for Amount) or % (for Percentage).
Unit Cost*	Calculated cost per unit for the item on this line. Calculation is the List Price less Discount amount.
Extended Cost	Display-only. If a Quantity and unit cost have been provided, OLE automatically calculates the extended cost for this line (**UOM** x **Unit Cost**).
Tax Amount	Display-only. If the 'ENABLE SALES TAX IND' is 'N' this column will not be displayed. If sales tax is turned on, the amount that displays here is automatically calculated based the delivery address.
Total Amount	Display-only. If tax has been calculated this will be the **Extended Cost** + **Tax Amount**. Otherwise, it will be the Extended Cost.
Route to Requestor	Optional. Yes/No indicator as to whether not requestor should be notified when item has been purchased. System default data value shall be "No".
Public View	Optional. Indicates whether or not a bibliographic description shall be exposed to users prior to purchase/receipt. Default is

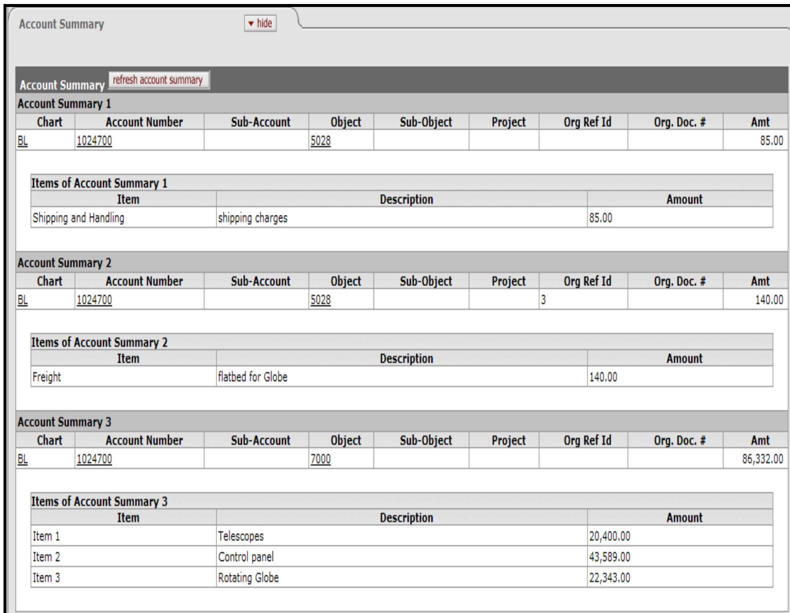
	Yes.
Currency Type	Display only. Identifies the associated vendor's currency as identified on the vendor record that is identified in the Link to Vendor/Supplier.
Foreign List Price	Basic foreign price of an item before any discounts are taken.
Foreign Discount	Foreign discount provided by the vendor/customer number/organization combination when the vendor record has a Currency Type different from the system default currency. Should be automatically populated from the Vendor customer number table based on the selected vendor and customer number (PUR_VNDR_CUST_NBR_T: VNDR_CUST_NBR). This data can be changed for the specific title. Must identify the type of discount (amount or %.) If the vendor record does not have a Currency Type noted other than the default system currency (aka US dollar), then the discount should populate the Discount field.
Foreign Discount Type	Choose # (for Amount) or % (for Percentage).
Foreign Discount Amt	Foreign Discount Amount is a calculated value in the foreign currency.
Foreign Unit Cost	Calculated foreign cost per unit for the item or service on this line. Calculation is the Foreign List Price less Foreign Discount amount.
Exchange Rate	Currency conversion rate populates from the Currency rate column in the Currency Type maintenance table (which is populated each night into system as Batch from bank files). The rate will populate when user clicks action button "Calculate" on conversion tab. Optionally: when currency tab opens, currency rate may auto-populate. This may be updated up until the Requisition is approved. After that point, it may no longer be modified.
USD Unit Cost	Cost converted to the system's default currency type exchange rate.
Bib Info	
Title*	Title of the bibliographic item being requested. Must be entered via the **Bib Editor** Create.
Author	Author of the bibliographic item being requested. Must be entered via the **Bib Editor** Create.
Requestor	Defaults to the selector's user name. If the Requestor is different than the selector, you may use the **Requestor** lookup to find the requesting individual's name or create a new

	Requestor.
Category	Optional. Select the Category assigned to the requested item.
Format	Optional. Select the Format of the requested item.
Item Price Source	Optional. Select the Price Source of the requested item.
Request Source	Optional. Select the Request Source of the requested item.
Vendor Item Identifier	Optional. Identifies a vendor item identifier if one has been provided by a vendor.
Notes	
Note Type	Optional. Select a Note Type to identify the note.
Note	Optional. Free text note to include additional information about the requested item.
Action	Add or delete notes as appropriate.
Actions	Add or delete lines as appropriate. After a line has been added, it is moved to the **Current Items** section, where the details may be viewed or modified by opening the item using the **show** button.
Accounting Lines for 'Add Item/Current Items' section	
Chart	Required. Select the chart code from the **Chart** list.
Account Number	Required. Enter the account number or search for it from the **Account** lookup.
Sub-Account	Optional. Enter the sub-account number or search for it from the **Sub-Account** lookup.
Object	Required. Enter the object code or search for it from the **Object Code** lookup.
Sub-Object	Optional. Enter the sub-object code or search for it from the **Sub-Object** lookup.
Project	Optional. Enter the project code or search for it from the **Project** lookup.
Org Ref Id	Optional. Enter the appropriate data for the transactions.
Dollar $*	Display only. Calculated total dollar amount that will be applied to the Line Account.
Percent*	Indicates the Percentage that will be applied to the Line Account. System default data value 100%.
Actions	Add or delete lines as appropriate.
Additional Charges section: This section can be repeated for the following additional charges: • Freight • Shipping Handling • Full Order Discount • Trade In	
Item Type	Display-only. Describes the type of miscellaneous item (freight or shipping and handling) being defined in this line.

Description*	Required if the extended cost has been entered. Enter text describing the additional charges item line.
Extended Cost*	Required. Enter the dollar amount for this item line.
Tax Amount	Display-only. Automatically calculated based on responses in other fields.
Total Amount	Display-only. Automatically calculated based on responses in other fields. Displays the total of the requisition after taxes and fees.
Accounting Lines section *for each type of Additional Charge*	
Chart	Required. Select the chart code from the **Chart** list.
Account Number	Required. Enter the account number or search for it from the **Account** lookup .
Sub-Account	Optional. Enter the sub-account number or search for it from the **Sub-Account** lookup .
Object	Required. Enter the object code or search for it from the **Object Code** lookup .
Sub-Object	Optional. Enter the sub-object code or search for it from the **Sub-Object** lookup .
Project	Optional. Enter the project code or search for it from the **Project** lookup .
Org Ref Id	Optional. Enter the appropriate data for the transactions.
Amount	Display only. Calculated total dollar amount that will be applied to the Line Account.
Percent	Indicates the Percentage that will be applied to the Line Account. System default data value 100%.
Actions	Add or delete lines as appropriate.
Totals section	
Total Prior to Tax	Display-only. This field displays a total of all item lines and miscellaneous item lines.
Total Tax	Display-only. This field displays a total of all tax applied.
Grand Total	Display-only. This field displays a total of all item lines and miscellaneous item lines plus taxes.
APO Limit	Display-only. This field displays the upper dollar limit for the creation of an automatic PO from this requisition. This dollar amount is based on a system default or, if a contract has been specified, on a contract-specific dollar amount.
Payment Info Tab	
Payment Info section	
Type of Recurring Payment	Optional. Select the proper recurring payment schedule from the list. Examples might include 'Fixed Schedule, Fixed Amount', 'Fixed Schedule, Variable Amount' and 'Variable Schedule, Variable Amount'.
Begin/End Date*	Required if **Type of Recurring Payment** has been selected. Indicates the time period in which the requisition is active. Enter a date or select the date from the calendar .

Billing Address section	
Address	Display-only. Displays the address to which vendor invoices should be mailed. This address is based on the campus specified for delivery on the **Delivery** tab.
Additional Institution Info Tab	
Additional section	
Method of PO Transmission*	Required. From the list, select the PO transmission method that should be used to send the related PO to the vendor. Choices include 'Print' and 'No Print'.
Cost Source	Display-only. The cost source will always be 'estimate' unless the vendor was selected from the **Contract** lookup . In that case the cost source associated with the contract is displayed here.
Contact Name	Optional. The name of the person to be contacted if there are questions about the requisition. Enter a name in the field or search for it from the **User** lookup . The contact name may be used if the requestor should not be contacted with questions.
Contact Phone	Optional. Enter the phone number of the person specified in the **Contact Name** field.
Contact Email	Optional. Enter the email address of the person specified in the **Contact Name** field.
PO Total Cannot Exceed	Optional. This field indicates a total dollar amount that the associated PO should not exceed.
Requestor Name*	Required. The name of the person requesting the good or services. The default is the initiator. This field may be changed by entering a new name or searching for it from the **user** lookup .
Requestor Phone*	Required. Enter the phone number of the person specified in the **Requestor Name** field.
Requestor Email*	Required. Enter the email address of the person specified in the **Requestor Name** field.
Reference (1-3)	Optional. Provide any type of additional reference information you want to include.

Account Summary Tab
Click refresh account summary to reload the page and view all the fiscal years, accounting lines and dollar amounts for this requisition.



Account Summary ▾ hide

Account Summary refresh account summary

Account Summary 1

Chart	Account Number	Sub-Account	Object	Sub-Object	Project	Org Ref Id	Org. Doc. #	Amt
BL	1024700		5028					85.00

Items of Account Summary 1

Item	Description	Amount
Shipping and Handling	shipping charges	85.00

Account Summary 2

Chart	Account Number	Sub-Account	Object	Sub-Object	Project	Org Ref Id	Org. Doc. #	Amt
BL	1024700		5028			3		140.00

Items of Account Summary 2

Item	Description	Amount
Freight	flatbed for Globe	140.00

Account Summary 3

Chart	Account Number	Sub-Account	Object	Sub-Object	Project	Org Ref Id	Org. Doc. #	Amt
BL	1024700		7000					86,332.00

Items of Account Summary 3

Item	Description	Amount
Item 1	Telescopes	20,400.00
Item 2	Control panel	43,589.00
Item 3	Rotating Globe	22,343.00

View Related Documents Tab	
Date	Display-only. The date the related document was created.
User	Display-only. The user who created the related document. The entry 'Kuali System User' means the document was automatically created by the system.
Note	Display-only. The note describing the document.
View Payment History Tab	
Payment History - Payment Requests section	
PREQ #	Display-only. The payment request number.
Invoice #	Display-only. The invoice number.
PO#	Display-only. The purchase order number.
PREQ Status	Display-only. The payment request status.
Hold	Display-only. The value is 'true' if the payment request is on hold and 'false,' if the payment request is not on hold.
Req Canc	Display-only. The value is 'true' if the payment request has been canceled and 'false' if the payment request has not been canceled.
Vendor Name	Display-only. The vendor name.
Customer #	Display-only. The customer number.
Amount	Display-only. The payment request amount.
Pay Date	Display-only. The date to make payment on this payment request.
PDP Extract Date	Display-only. The date the payment request was requested for processing by the Pre-Disbursement Processor.
Paid?	Display-only. The value is 'true' if the payment has been

	disbursed and 'false' if the payment has not been disbursed.
Payment History - Credit Memos section	
CM #	Display-only. The credit memo number defined in [OLE].
Vendor CM #	Display-only. The credit memo number defined by the vendor.
PREQ #	Display-only. The payment request number.
PO #	Display-only. The purchase order number.
Credit Memo Status	Display-only. The credit memo status.
Hold	Display-only. The value is 'true' if the credit memo in on hold and 'false' if it is not on hold.
Vendor Name	Display-only. The vendor name.
Customer #	Display-only. The customer number.
Amount	Display-only. The credit memo amount.
APAD Date	Display-only. The accounts payable approved date (the date the Accounts Payable Review group approved the credit memo).
PDP Extract Date	Display-only. The date the credit memo was requested for processing by the Pre-Disbursement Processor.
Paid?	Display-only. The value is 'true' if a payment has been disbursed to which this credit memo was applied and 'false' if it has not yet been included in a payment.
Notes and Attachments Tab	
Posted Timestamp	Display-only. The time and date when the attachment or note was posted.
Author	Display-only. The full name of the user who has added the notes or attachments.
Note Text	Required. Enter comments.
Attached File	Optional. Select the file to attach by clicking **Browse** and using the standard **Choose File** dialog box. Click **Cancel** to clear the file name you have selected.
Notification Recipient	
Actions	Click add to add a note.
Ad Hoc Recipients Tab	
Person Requests section	
Action Requested	Required. Select the desired action from the **Action Requested** list. The choices are **APPROVE**, **ACKNOWLEDGE**, and **FYI**.
Person	Required when routing the document to an individual. Enter a user ID or select it from the lookup .
Actions	Click add to add an ad hoc request to a person.
Ad Hoc Group Requests section - Required when routing the document to a group. Enter a group name or select it from the lookup .	
Action Requested	The action one needs to take on a document; also the type of action that is requested by an Action Request.

Namespace Code	Code for the group selected in *Name*.
Name	Enter the group name or use the **Lookup** icon to search for the appropriate group name.
Actions	Click add to add a an ad hoc request to a group.
Route Log Tab	
ID	
Title	A short summary of the notification message.
Type	The document type. The full name of the transaction used to identify this document type in Workflow.
Initiator	An OLE user role for a person who creates (initiates or authors) a new document for routing.
Route Status	The workflow status of a document in the course of its routing.
Node(s)	The current route node of the document—that is, the current step that the document is on, on its route path. Route nodes are also referred to as 'route levels'.
Created	The time and date that the document was created.
Last Modified	The time and date that the document was modified last.
Last Approved	The time and date that the last action was taken on this document.
Finalized	The time and date that the document reached' Final,' 'Canceled,' or 'Disapproved' status.
Actions Taken section	
Action	System action.
Taken by	Name of the person who took the action.
For Delegator	Name of a delegate that took action on someone else's behalf.
Time/Date	Time and date the action was taken.
Annotation	
Pending Action Requests section	
Action	Indicates whether the document is in a user or group's action list or is pending their approval.
Requested of	Displays the name of the user or group responsible for the pending action.
Time/Date	
Annotation	
Detail section	
Node	The route node at which this request was generated.
Priority	The priority assigned to this workflow request. If multiple requests are generated at the same workflow node, the system generates requests with low priority numbers before requests with higher priority numbers.
Approval Policy	A value indicating whether members of a role receiving this request must each take action to fulfill the request or if only a single role member must take action.
Forced Action	A true/false indicator specifying whether a user must take action on this document even if he or she has acted on it previously. If 'True,' then the user must take another action. If 'False,' then

	the previous action will automatically fulfill this request.
Future Action Requests section	
Action	
Requested of	
Time/Date	
Annotation	Message that is generated based on the KIM responsibilities being referenced by Workflow
Log Action Message section	
Action Message	