

KFS Administration

Presented By:
Campus Services

Campus Services

Campus Services, a financial customer services unit within Business and Financial Services, partners with the campus community by providing professional, knowledgeable and responsible business and financial solutions.

WEBSITE:

[HTTP://BUSFIN.COLOSTATE.EDU/CS.ASPX](http://busfin.colostate.edu/cs.aspx)

Agenda

- ▶ Account Responsibility Roles
- ▶ Employee Starting or Leaving
- ▶ Changing Account Responsibility Roles
- ▶ Account Delegates
- ▶ Login from Off Campus

Account Responsibility

Account Responsibility

- ▶ Fiscal Officer
- ▶ Account Manager
- ▶ Account Supervisor

- ▶ Link to Fiscal Roles and Responsibilities
 - <http://kuali.colostate.edu/default.aspx>
(Under Guides and Documentation)

Fiscal Officer

▶ Oversight role:

- Day to day person
- Responsible for understanding postings and can answer questions about the account

▶ Document approval process:

- First to approve
- Final departmental approver if $\leq \$1000$ (Document Types: DV, IB, IO, REQ, and WOA)

(Except official functions)

▶ Qualifications:

- State Classified, Admin Pro, or Faculty
- Typically at the Accounting Technician, Admin Assistant, General Professional level

Account Manager

▶ **Operations role:**

- Does not have approval authority just by being named the Account Manager

▶ **Ensures funds are:**

- Spent & managed according to the goals/objectives/mission of the department
- Spent according to a budgeted plan

▶ **Ensures expenses are:**

- Appropriate to the account

▶ **Qualifications:**

- Can be State Classified, Admin Pro, Faculty
- Typically at the Business Manager, Office Manager, Assistant/Associate Director level (can be the fiscal officer)

Account Supervisor

▶ Leadership role:

- Account management at a higher level
- Overall management of the departments' funds
- Does not have approval authority just by being named the Account Supervisor.

▶ Qualifications:

- State Classified, Admin Pro, Faculty
- **Cannot** be Fiscal Officer or Account Manager
- Typically at the Dean, Director, Department Head level
- Principal Investigator on 53xxxxx accounts

Document Approval Limits

Departmental Approvals:

<=\$1000

Fiscal Officer

Department (Doc. Types: AV, BA, DI, GEC, Encumbrance, TF)

\$1000.01-\$9999.99

Fiscal Officer

Department (organization-ORG)
(Doc. Type: DV, IB, IO, REQ, WOA)

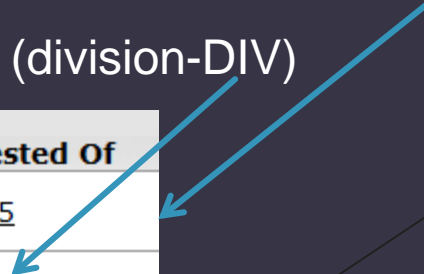
>=\$10,000

Fiscal Officer

Department (organization-ORG)
Dean/VP (division-DIV)

Route Log

| Action | Requested Of |
|------------------------|-----------------|
| PENDING APPROVE | <u>ORG-8045</u> |
| PENDING APPROVE | <u>DIV-V4</u> |



Employee Starting or Leaving

New Employee KFS Access




- ▶ A new employee must fill out an application for access to Kuali Financial Systems
- ▶ A Hospitality approver must fill out a hospitality form
- ▶ A Department approver (ORG-xxxx) must fill out a signature authorization form
- ▶ Capital Asset Manager processors should fill out a KFS application designating that role
- ▶ Officers with authority to disposition assets (EACR) should fill out a new Property Accountability – Authorized Signers form
 - The above forms can be found at:
<http://busfin.colostate.edu/forms.aspx>

Employee Leaving Department

- ▶ Checklist before Employees Departure:
 - Cancel KFS access for the person leaving, including date they are leaving
 - To cancel access contact Connie MacNaughton at connie.macnaughton@colostate.edu
 - If applicable, designate a new:
 - Fiscal Officer
 - Account Manager
 - Account Supervisor
 - Department approver (ORG-xxxx)
 - Dean/VP approver (DIV-XX)
 - Official Function (Business Authorized Function) approver (HOSP-xxxx)
 - Delegate
 - Capital Asset Manager (CAM) processor
 - Disposition of Assets (EACR) signer
 - PCARD reconciler
 - PCARD cardholder

Employee Leaving Department

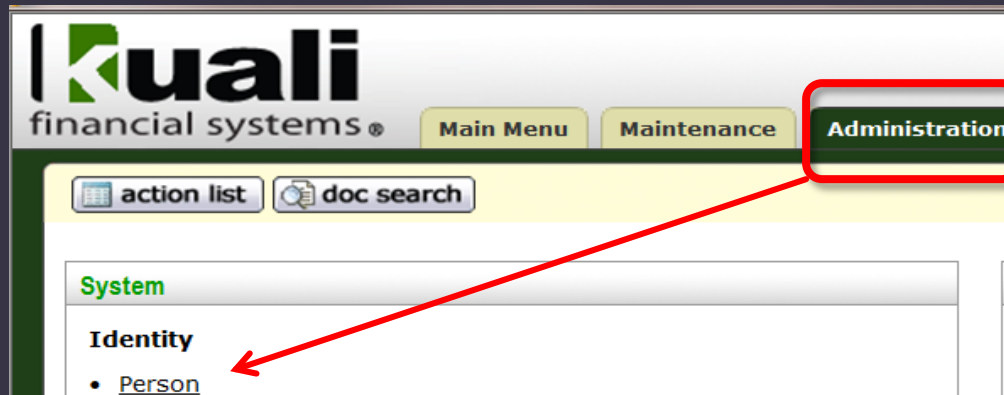
- ▶ To see if the employee leaving is a Fiscal Officer, Account Manager, or Account Supervisor, from the account lookup screen, search each field to determine if changes are needed.

| | | | |
|---|----------------------|---|---|
| Fiscal Officer Principal Name: | <input type="text"/> |  | ← |
| Account Supervisor Principal Name: | <input type="text"/> |  | ← |
| Account Manager Principal Name: | <input type="text"/> |  | ← |

- ▶ To make changes to all the employee's accounts use account global documents to make necessary changes.
 - **Exclude 53xxxxx accounts** – send those updates to your SP Team.
 - Account Global Document link
 - <http://kuali.colostate.edu/default.aspx>

Employee Leaving Department

- ▶ Approver Roles –
Department/Division/Official Functions
 - Go to the Administration tab and click on the person link



Employee Leaving Department

- Then, search by the person's first & last name.
- From the search results, click on the person's name.

kuali financial systems® Main Menu Maintenance Administration Provide Feedback 20111027-Prod (Oracle9i)

action list doc search Logged in User: epillsbu

Person Lookup ?

* required field

| | |
|--------------------------|--|
| Principal Name: | <input type="text"/> |
| Principal ID: | <input type="text"/> |
| Entity ID: | <input type="text"/> |
| First Name: | <input type="text" value="Kerry"/> |
| Middle Name: | <input type="text"/> |
| Last Name: | <input type="text" value="Wenzler"/> |
| Email Address: | <input type="text"/> |
| Phone Number: | <input type="text"/> |
| Employee ID: | <input type="text"/> |
| Campus Code: | <input type="text"/> 🔍 |
| Primary Department Code: | <input type="text"/> |
| Employee Status Code: | <input type="text"/> 🔍 |
| Employee Type Code: | <input type="text"/> 🔍 |
| Active Indicator: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

One item retrieved.

| Principal ID | Principal Name | Name | Entity ID | Campus Code | Primary Department Code | Employee ID |
|--------------|----------------|------------------|-----------|-------------|-------------------------|-------------|
| 11932 | nakasone | Wenzler, Kerry M | 10779 | MC | CO-8011 | 823150595 |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Employee Leaving Department

- From the person's record, click "show" on the membership tab

Person

expand all collapse all

Overview hide

| | | | |
|---------------------|----------|----------------------------|-------|
| Entity Id: | 10779 | Principal Id: | 11932 |
| Principal Name: | nakasone | Tax Identification Number: | ***** |
| Principal Password: | | Active: | Yes |

Affiliations

| Affiliation Type | Campus Code | Default |
|------------------|-------------|---------|
| Staff | MC | Yes |

hide Employment Information

| 1 | Employment Id | Primary | Employee Status | Employee Type | Base Salary Amount | Primary Department Code |
|---|---------------|---------|-----------------|---------------|--------------------|-------------------------|
| 1 | 823150595 | Yes | A | Professional | 0.01 | CO-8011 |

Contact show

Privacy Preferences show

Membership show

close

Employee Leaving Department

▼ hide Employment Information

| | <u>Employee Id</u> | <u>Primary</u> | <u>Employee Status</u> | <u>Employee Type</u> | <u>Primary Department Code</u> |
|---|--------------------|----------------|------------------------|----------------------|--------------------------------|
| 1 | 823150595 | Yes | Active | Professional | CO-8011 |

Contact ▶ show

Privacy Preferences ▶ show

Membership ▼ hide

▼ hide Groups

| | <u>Group</u> | <u>Namespace Code</u> | <u>Name</u> | <u>Type</u> | <u>Active From Date</u> | <u>Active To D</u> |
|---|--------------|-----------------------|-------------|-------------|-------------------------|--------------------|
| 1 | 1000826 | KR-WKFLW | IO-141 | Default | | |
| 2 | 1000898 | KR-WKFLW | ORG-8011 | Default | 12/31/2012 | |

▼ hide Roles

| | <u>Role</u> | <u>Namespace Code</u> | <u>Name</u> | <u>Type</u> | <u>Active From Date</u> | <u>Active To</u> |
|---|-------------|-----------------------|-------------|-----------------------|-------------------------|------------------|
| 1 | 54 | KFS-SYS | User | Financial System User | | |

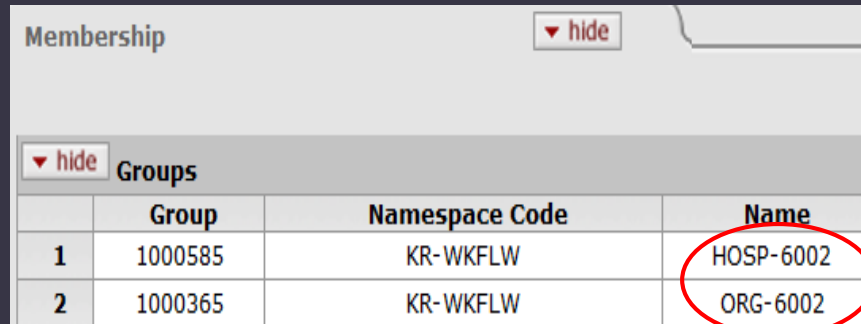
▼ hide Role Qualifier

| | <u>* Namespace Code</u> | <u>* Chart Code</u> | <u>* Organization Code</u> | <u>Active From Date</u> | <u>Acti</u> |
|---|-------------------------|--------------------------------|----------------------------|-------------------------|-------------|
| 1 | KFS-SYS | CO - Colorado State University | 8011 | | |

▼ hide Delegations

Employee Leaving Department

- ▶ Review if user is a department (ORG), Dean/VP office (DIV), or official function (HOSP) approver.
 - ORG-xxxx (xxxx = department #)
 - DIV-xx (xx = 2 character division code)
 - HOSP-xxxx (xxxx = department #)
- ▶ This person is both a department (ORG-6002) and official function approver (HOSP-6002) for department 6002.



Membership


Groups





| | Group | Namespace Code | Name |
|---|---------|----------------|-----------|
| 1 | 1000585 | KR-WKFLW | HOSP-6002 |
| 2 | 1000365 | KR-WKFLW | ORG-6002 |

- ▶ New approvers for any of these levels should complete access form(s) from:
 - <http://busfin.colostate.edu/forms.aspx>

Employee Leaving Department

- ▶ Review if user is a delegate
 - From the 'Account Delegate Lookup' screen, search to determine if user is a delegate.

Account Delegate Lookup 

| | | |
|----------------------------------|--------------------------------------|---|
| Chart Code: | <input type="text"/> |  |
| Account Number: | <input type="text"/> |  |
| Document Type Name: | <input type="text"/> |  |
| Account Delegate Principal Name: | <input type="text"/> |  |
| Account Delegate Active: | <input checked="" type="radio"/> Yes | <input type="radio"/> No <input type="radio"/> Both |

- Input a new delegation as necessary.

Employee Leaving Department

▶ Other Roles:

- Capital Asset Manager (CAM) processor
- Asset Representative (assigned capital assets in CAM) – transfer assets to a new representative.
- Internal Order Supplier (IO)
- Review if user is a member of any other roles

Membership

Groups

| | Group | Namespace Code | Name |
|---|---------|----------------|---------------|
| 1 | 1003090 | KR-WKFLW | CAM-PROCESSOR |
| 2 | 1000810 | KR-WKFLW | IO-153 |

- This user is both a CAM processor and an internal order supplier.
- Users needing access to these roles should complete an access form from:
 - <http://busfin.colostate.edu/forms.aspx>

Employee Leaving Department

- ▶ PCARD reconciler and/or cardholder
 - Review if user is a reconciler
 - name is PCARD-xxxx

| ▼ hide Groups | | | |
|---------------|---------|----------------|------------|
| | Group | Namespace Code | Name |
| 1 | 1002984 | KR-WKFLW | PCARD-3044 |
| 2 | 1002855 | KR-WKFLW | PCARD-1170 |

- ▶ Contact the PCARD Help Desk to update PCARD reconciler role and to cancel the card.
 - procurement_pcard_help_desk@Mail.Colostate.edu

Employee Leaving Department

▶ Checklist:

- Delete Users Access
- Update Fiscal Officer, Account Manager, Account Supervisor
- Assign new Delegates
- Update Approval authority
- Other Roles (CAM's, Asset Representative, Internal Orders, etc.)
- PCARD – update reconciler role
- PCARD – cancel card

Changing Account Responsibility Roles

Changing Account Responsibility Roles

- ▶ Why would you want to change the Responsibility Roles?
 - If an individual leaves, transfers departments, changes positions/responsibilities, etc.

Changing Account Responsibility Roles

Lookup and Maintenance

Capital Asset Builder

- Pre-Asset Tagging

Capital Asset Management

- Asset
- Asset Fabrication
- Asset Global (Add)
- Asset Location Global
- Asset Payment
- Asset Retirement Global

Chart of Accounts

- Account
- Account Global
- Account Delegate
- Account Delegate Global
- Account Delegate Model
- Account Delegate Global From Model
- Object Code
- Object Code Global
- Organization
- Project Code
- Sub-Account
- Sub-Object Code
- Sub-Object Code Global

Financial Processing

- Disbursement Voucher Travel Company

Vendor

- Vendor
- Vendor Contracts

Changing Account Responsibility Roles

Financial systems **Main Menu** Maintenance Administration

action list doc search Logged in User: sleaming@c

Account Lookup ?

| | |
|------------------------------------|---|
| Chart Code: | <input type="text" value="CO"/> |
| Account Number: | <input type="text" value="2702000"/> |
| Account Title: | <input type="text"/> |
| Organization Code: | <input type="text"/> |
| Account Type Code: | <input type="text"/> |
| Sub-Fund Group Code: | <input type="text"/> |
| Higher Education Function Code: | <input type="text"/> |
| Fiscal Officer Principal Name: | <input type="text"/> |
| Account Supervisor Principal Name: | <input type="text"/> |
| Account Manager Principal Name: | <input type="text"/> |
| Closed?: | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> Both |

Type in the Account number you wish to change.

You have entered the primary key for this table (Chart Code, Account Number) in the search criteria. Since these fields can be used to uniquely identify a row in this table, the other search criteria entered will be ignored

One item retrieved.






Click edit

| Account Number | Chart Code | Account Number | Account Title | Organization Code | Account Type Code | Sub-Fund Group Code | Higher Education Function Code | Fiscal Officer Name | Account Manager Name | Account Supervisor Name | |
|----------------------|----------------------|----------------|---------------|---------------------|-------------------|---------------------|--------------------------------|---------------------|----------------------|-------------------------|-------------------------|
| edit | copy | CO | 2702000 | Preview Orientation | 8011 | NA | AUX | AEDF | Wenzler, Kerry M | Diehl, Vicki Lynn | Diqregorio, Gave Golter |


Export options: [CSV](#) | [spreadsheet](#) | [XML](#)


Changing Account Responsibility Roles


Click for person lookup


| Account Responsibility ▼ hide | |
|--|---|
| Old | New |
| Fiscal Officer Principal Name: nakasone@colostate.edu - Wenzler, Kerry M | * Fiscal Officer Principal Name: <input type="text" value="nakasone@colostate.edu"/>  Wenzler, Kerry M |
| Account Manager Principal Name: vdiehl@colostate.edu - Diehl, Vicki Lynn | * Account Manager Principal Name: <input type="text" value="vdiehl@colostate.edu"/>  Diehl, Vicki Lynn |
| Account Supervisor Principal Name: ggolter@colostate.edu - Digregorio, Gaye Golter | * Account Supervisor Principal Name: <input type="text" value="ggolter@colostate.edu"/>  Digregorio, Gaye Golter |
| Income Stream Chart Of Accounts Code: CO - Colorado State University | Income Stream Chart Of Accounts Code: <input type="text" value="CO - Colorado State University"/>  |
| Income Stream Account Number: 1300000 | Income Stream Account Number: <input type="text" value="1300000"/>  |


Changing Account Responsibility Roles


Person Lookup 


Principal Name: 


Principal ID: 


Entity ID: 


First Name: 


Middle Name: 


Last Name: Leathers 




Email Address: 




Phone Number: 


Employee ID: 

Campus Code: 

Primary Department Code: 

Employee Status Code:   

Employee Type Code:   

Active Indicator: Yes No Both 

One item retrieved.

| Return Value | Principal ID | Principal Name | Name | Entity ID | Campus Code | Primary Department Code |
|---------------------|--------------|------------------------|-----------------|-----------|-------------|-------------------------|
| <u>return value</u> | 45516 | daleathe@colostate.edu | Leathers, David | 7752 | MC | CO-6003 |

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Changing Account Responsibility Roles

| Old | New |
|--|---|
| Chart Code: CO | Chart Code: CO |
| Account Number: 2702000 | Account Number: 2702000 |
| Account Title: Preview Orientation | * Account Title: <input type="text" value="Preview Orientation"/> |
| Organization Code: 8011 | * Organization Code: <input type="text" value="8011"/> |
| Campus Code: MC - CSU Main Campus | * Campus Code: <input type="text" value="MC - CSU Main Campus"/> |
| Account Effective Date: 07/01/2009 | * Account Effective Date: <input type="text" value="07/01/2009"/> |
| Account Postal Code: 80523 | * Account Postal Code: <input type="text" value="80523"/> |
| Account City Name: FORT COLLINS | * Account City Name: <input type="text" value="FORT COLLINS"/> |
| Account State Code: CO | * Account State Code: <input type="text" value="CO"/> |
| Account Street Address: 8011 Campus Delivery | * Account Street Address: <input type="text" value="8011 Campus Delivery"/> |
| Sub-Fund Group Code: AUX | * Sub-Fund Group Code: <input type="text" value="AUX"/> |
| Account Expiration Date: | Account Expiration Date: <input type="text"/> |
| Continuation Chart Code: CO - Colorado State University | Continuation Chart Code: <input type="text" value="CO - Colorado State University"/> |
| Continuation Account Number: 2008011 | Continuation Account Number: <input type="text" value="2008011"/> |
| Closed?: No | Closed?: <input type="checkbox"/> |
| Labor Benefit Rate Category Code: | Labor Benefit Rate Category Code: <input type="text"/> |

Account Responsibility *

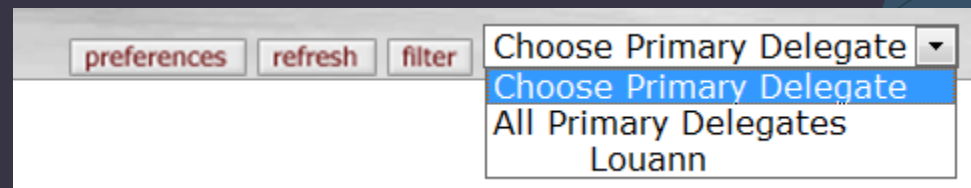
| Old | New |
|--|--|
| Fiscal Officer Principal Name: nakasone@colostate.edu - Wenzler, Kerry M | * Fiscal Officer Principal Name: <input type="text" value="nakasone@colostate.edu"/> Wenzler, Kerry M |
| Account Manager Principal Name: vdiehl@colostate.edu - Diehl, Vicki Lynn | * Account Manager Principal Name: <input type="text" value="daleathe@colostate.edu"/> Leathers, David * |
| Account Supervisor Principal Name: ggolter@colostate.edu - Digregorio, Gaye Golter | * Account Supervisor Principal Name: <input type="text" value="ggolter@colostate.edu"/> Digregorio, Gaye Golter |
| Income Stream Chart Of Accounts Code: CO - Colorado State University | Income Stream Chart Of Accounts Code: <input type="text" value="CO - Colorado State University"/> |
| Income Stream Account Number: 1300000 | Income Stream Account Number: <input type="text" value="1300000"/> |

Account Delegates

Account Delegates

- ▶ The purpose of a delegate is to approve a document in place of the fiscal officer (FO)
- ▶ When should you use a delegate?
 - Set up delegates on all accounts, to ensure coverage during sick/annual leave
- ▶ Primary Delegation:
 - document appears in delegates action lists', and in FO action list via the drop down (shown below)
 - use when FO is out of the office for extended period (planned absence)

FO Action List:

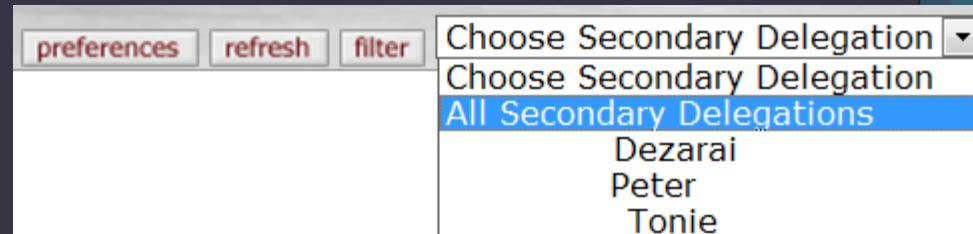


Account Delegates

▶ Secondary Delegation:

- Document automatically appears in delegates action list via the drop down shown below
- Document automatically appears in the FO action list
- Recommend using secondary delegation to account for all situations (planned and unplanned absences)

Delegates Action List:



Account Delegates

- ▶ Setup - Document Type Names
 - KFST all dollar documents
- ▶ Non-dollar documents
 - ACCT account (only valid on account changes)
 - GSOB sub-object global
 - SACC sub-account
 - SOBJ sub-object

Account Delegates

action list

doc search

Transactions

Budget Construction

- [Budget Construction Selection](#)

Financial Processing

- [Advance Deposit](#)
- [Adjustment/Accrual Voucher](#)
- [Budget Adjustment](#)
- [Cash Receipt](#)
- [Disbursement Voucher](#)
- [Distribution of Income and Expense](#)
- [General Error Correction](#)
- [Indirect Cost Adjustment](#)
- [Internal Billing](#)
- [Internal Order](#)
- [Pre-Encumbrance](#)
- [Single Sided Budget Adjustment](#)
- [Transfer of Funds](#)
- [Work Order Authorization](#)

Purchasing/Accounts Payable

- [Contract Manager Assignment](#)
- [Payment Request](#)
- [Receiving](#)
- [Requisition](#)
- [Shop Catalogs](#)
- [Vendor Credit Memo](#)

Administrative Transactions

Capital Asset Builder

- [Capital Asset Builder AP Transactions](#)
- [Capital Asset Builder GL Transactions](#)

Capital Asset Management

- [Asset Manual Payment](#)
- [Barcode Inventory Process](#)
- [Asset Year End Depreciation](#)

Financial Processing

- [Cash Management](#)
- [General Ledger Correction Process](#)
- [Journal Voucher](#)
- [Non-Check Disbursement](#)
- [Service Billing](#)

Custom Document Searches

Financial Transactions

Capital Asset Management

- [Asset Maintenance](#)

Financial Processing

- [Disbursement Vouchers](#)

Purchasing/Accounts Payable

- [Electronic Invoice Rejects](#)
- [Payment Requests](#)
- [Purchase Orders](#)
- [Receiving](#)
- [Requisitions](#)
- [Vendor Credit Memos](#)

Lookup and Maintenance

Capital Asset Builder

- [Pre-Asset Tagging](#)

Capital Asset Management

- [Asset](#)
- [Asset Fabrication](#)
- [Asset Global \(Add\)](#)
- [Asset Location Global](#)
- [Asset Payment](#)
- [Asset Retirement Global](#)

Chart of Accounts

- [Account](#)
- [Account Global](#)
- [Account Delegate](#)
- [Account Delegate Global](#)
- [Account Delegate Model](#)
- [Account Delegate Global From Model](#)
- [Object Code](#)
- [Object Code Global](#)
- [Organization](#)
- [Project Code](#)
- [Sub-Account](#)
- [Sub-Object Code](#)
- [Sub-Object Code Global](#)

Account Delegate

- ▶ You can search specifically or create new

kuali
financial systems®

[Main Menu](#) [Maintenance](#) [Administration](#)

20111027-Prod (Oracle9i)

[Provide Feedback](#)

action list doc search

Logged in User: epillsbu

Account Delegate Lookup ?

create new
* required field

| | |
|----------------------------------|--|
| Chart Code: | <input type="text" value="CO"/> |
| Account Number: | <input type="text"/> |
| Document Type Name: | <input type="text"/> |
| Account Delegate Principal Name: | <input type="text"/> |
| Account Delegate Active: | <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both |

search clear cancel

Account Delegate

Account Delegate ?

Doc Nbr: 280727

Initiator: sleamin

Document Overview ▼ hide

Document Overview

* Description: Set Up a Secondary Delegate for Account

Organization Document Number:

Explanation: This is to create a secondary delegate for account 2702000

Edit Account Delegate ▼ hide

New

* Chart Code:

* Account Number:

* Document Type Name:

* Account Delegate Principal Name:
Leaming, Summer E

Approval From This Amount:

Approval To This Amount:

Account Delegate Primary Route:

Account Delegate Active:

* Account Delegate Start Date:

Input the information you want to update with the new delegate

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

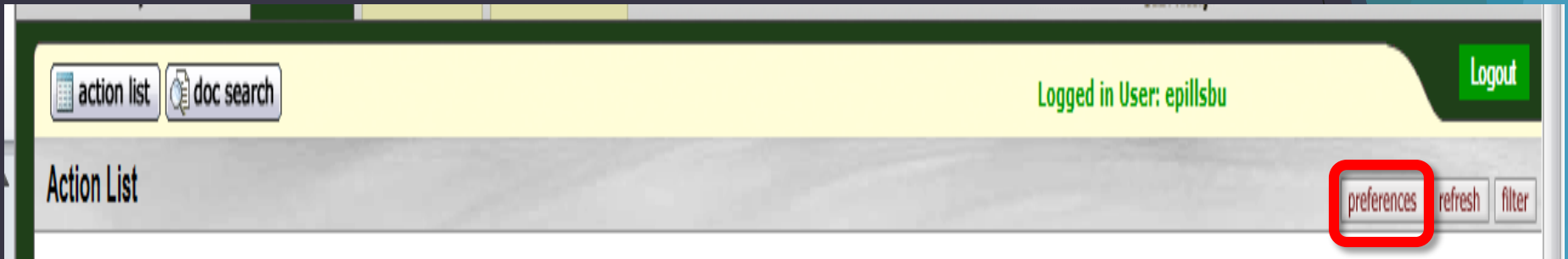
Account Delegates

- ▶ Use caution with dollar ranges
- ▶ New delegations override old delegations
- ▶ Account Delegate link
 - <http://kuali.colostate.edu/faqs.aspx>

KFS Action List Preferences

KFS Action List Preferences

- ▶ Click on the action list button
- ▶ Once in your action list in the far right corner is the button “preferences”



KFS Action List Preferences

- ▶ Once you click on preferences it will take you to the 'Workflow Preferences' screen
 - In the General Section you can update the automatic refresh, action list size, email notification, receive primary delegate emails, secondary delegate emails, Delegator Filter, and Primary Delegate Filter

Workflow Preferences

| General | |
|-----------------------------------|---|
| Automatic Refresh Rate: | 15 in whole minutes - 0 is no automatic refresh. |
| Action List Page Size | 25 |
| Email Notification | None <input style="font-size: small; vertical-align: middle;" type="button" value="?"/> |
| Receive Primary Delegate Emails | <input checked="" type="checkbox"/> |
| Receive Secondary Delegate Emails | <input type="checkbox"/> |
| Delegator Filter | Secondary Delegators on Action List Page <input type="button" value="v"/> |
| Primary Delegate Filter | Primary Delegates on Action List Page <input type="button" value="v"/> |
| Fields Displayed In Action List | |

KFS Action List Preferences

- ▶ Fields Displayed in Action List lets you check which fields you would like displayed in your action list

| Fields Displayed In Action List | |
|---------------------------------|-------------------------------------|
| Document Type | <input checked="" type="checkbox"/> |
| Title | <input checked="" type="checkbox"/> |
| ActionRequested | <input checked="" type="checkbox"/> |
| Initiator | <input checked="" type="checkbox"/> |
| Delegator | <input checked="" type="checkbox"/> |
| Date Created | <input checked="" type="checkbox"/> |
| Date Approved | <input checked="" type="checkbox"/> |
| Current Route Node(s) | <input type="checkbox"/> |
| WorkGroup Request | <input checked="" type="checkbox"/> |
| Document Route Status | <input checked="" type="checkbox"/> |
| Application Document Status | <input type="checkbox"/> |
| Clear FYI | <input checked="" type="checkbox"/> |
| Use Outbox | <input checked="" type="checkbox"/> |

KFS Action List Preferences

- ▶ Document Route Status Colors for Action List Entries
 - This allows you to color code your action list based on status
- ▶ Once you have made your necessary changes, click save

Document Route Status Colors for Actionlist Entries

| | | | | | | | | | | | | | |
|-------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Saved | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Initiated | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Disapproved | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Enroute | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Approved | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Final | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Processed | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Exception | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Canceled | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Login from Off Campus

Login from Off Campus

- ▶ Open a secure connection with your eID-
<https://secure.colostate.edu>
- ▶ Login to the Campus Administrative Portal (CAP)
- ▶ Open Quali Financial System (KFS)
- ▶ System down 7:00-10:00pm (M-F) and occasional Sunday mornings for maintenance (no more than once a month & is announced ahead of time)

Questions?

Contact your Campus Services
Representative with Quali Questions:

| | |
|-----------------|----------|
| Erin Mercurio | 491-6752 |
| Publina Meldrum | 491-4148 |
| Summer Leaming | 491-2801 |