**Kuali Financial System
Documentation**

COLORADO STATE University

Application Forms – Proper Procedures
Filling out KFS Forms Correctly

1/24/2023

Please read all of the notes below before filling out a new KFS Application. If any steps are omitted, your form may be rejected and sent back for completion.

Notes:

1. It is important to understand that any new user must be active in Oracle HR AND have their primary assignment checked before KFS access can be setup.
    a. On this same note, after a new user is active in Oracle HR, it will take a full night before the user shows up in KFS as active. Plan accordingly, please do not send in a KFS application ahead of time as this can cause delays.
    Below is a more detailed explanation of the issues faced when Oracle HR is not setup properly for a new/existing user.

HR Assignment and Primary Box

An employee HR assignment must be fully **Approved** in Oracle and have the **Primary box** checked on the **Active Assignment**. The HR Feed to KFS each night will bring over only Active Primary assignments. Failure to make the active assignment primary will result in the employee not feeding to KFS. Forms cannot be processed without the employee being active in KFS

Departments requesting KFS access for department users need to wait until the HR assignment is fully approved before sending over KFS Access Forms to process.

When completing the Oracle HR assignment, be sure to update the employees phone number. If the phone number is missing, it will not populate in KFS and this can cause issues when an order is input, the vendor or shipper will have no

way of contacting the user. The HR liaison needs to provide a phone number for the employee in the Oracle system so that this flows over to KFS.

2. It is important to note, by default, any active employee in Oracle HR will have limited access to KFS. This includes the following:
    a. The user can create Requisitions, use the Shop Catalogs, work with PO Receiving, and use Maintenance table lookups (asset, account, org, objects, and vendor).
    b. The user can approve TR documents issued to their account.
    c. The user can FYI any PCARD transactions that was charged against their card.
    d. *If the above is all that a new user needs, a KFS application form is not needed.
    e. Without full KFS access, the user **_CANNOT_** perform the following – Input Documents (except what is listed above), run Document Searches, or run GL Balance inquiries.
3. To receive full access for a new employee, a KFS Application form (listed below) must be completed and sent to the KFS Operations team for full access (Role 54). This will give the user the following additional access:
    a. Document input, Document search, Maintenance table lookups, and GL Balance inquiries.
    b. Users that need full access must send in a KFS Application form.
4. After sending in a new form, please allow 2 -3 business days for processing.
5. If sending in any form aside from the KFS Application, please note that General KFS access (Role 54) is needed first. To gain Role 54 access the "Application for Kuali Financial System" form needs to be submitted. Users that do not have role 54 will not be able to access the Group/Role that is being requested on the additional form(s).
6. If asking for a deletion of a retired or departed user, please note, once a user is terminated in Oracle HR, their KFS account will show as inactive in KFS as well. Asking for a specific deactivation time in KFS will not be possible after the termination has replicated from Oracle HR to KFS (once again, this is over night after the change has been made).
    a. On this note, when sending in a form to remove a user's access, signatures are not needed.
    b. If a person who had KFS access is terminated in Oracle or changes Assignments or Departments, KFS access is also terminated. BFS will require new a form(s) to be completed for the new assignment based on the refeed of employee information in the HR feed to KFS.
7. All signature lines must be signed and dated, or the form will be rejected and sent back. This will cause delays in setting up new users.
    a. If using Adobe Acrobat, Adobe Sign, or other applications to sign these forms, **_DO NOT_** lock the document after completion. If the document is locked, in order to complete it on KFSs side, the document must be printed out and scanned back in and this wastes paper and time that will cause delays in getting KFS access setup.
    b. On this note, The Authorized Business Function Approvals form **_REQUIRES_** a signature from the Chief of Staff, unless the form is being filled out for an Assistant/Associate VP or Assistant/Associate Dean. For the Chief of Staff's signature, please send this form to PresOfc_Signatures@colostate.edu.
8. There will be a download link for each individual form at the end of the explanation section for each form. Once a form is complete, send it to bfs_kfs_applications@Mail.Colostate.edu (this is the preferred method of receiving forms).