



ACCOUNTING AND KUALI FOR NON-ACCOUNTANTS

Presented by:
Campus Services

CAMPUS SERVICES

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

OVERVIEW

Accounting Meaning, and Objectives

Accounting Principles and Governing Bodies

Accounting Elements – Assets, Liabilities, Fund Balance, Revenue and Expenses

Debits and Credits

Kuali Object Code Review

Entering Kuali Documents

Accrual Accounting

CSU Sub funds

Calculating Balances

Reviewing Balances in Kuali

Kuali Overview

Responsibilities and Approvals in Kuali

ACCOUNTING OVERVIEW

Meaning and Objectives of Accounting

Accounting is a systematic and comprehensive manner of recording financial transactions.



The objective of accounting is to provide information to users for decision-making. But, who exactly are these "users of financial statements"? What information do they need?



The users of accounting information include: the owners and investors, management, suppliers, lenders, employees, customers, the government, and the general public.

Governing Principles and Bodies

GAAP: Generally Accepted Accounting Principles

GASB: Governmental Accounting Standards Board

FASB: Financial Accounting Standards Board



Revenue Principle: Revenue is recognized at the point of sale or when the services you provide are complete

Expense Principle: Expense is recognized at the time when goods are received, or services are performed

Matching Principle: Revenue generated and expenses incurred must match within the same fiscal year(FY)
(Accrual Accounting)

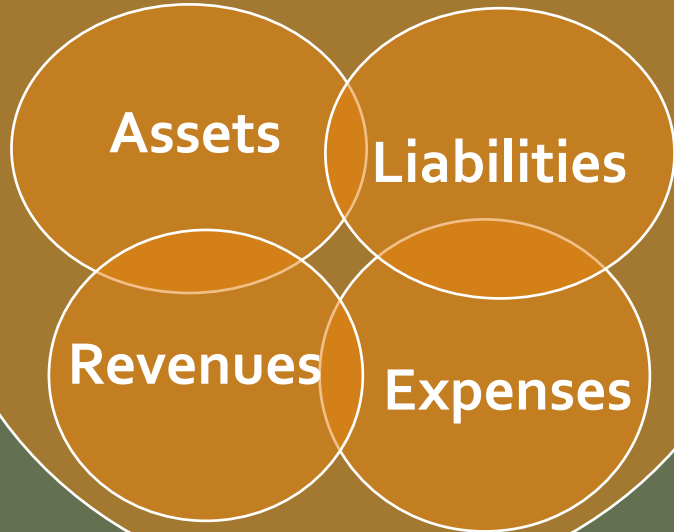
Consistency: Ability to compare reports from one FY to another, using the same assumptions across periods

Relevance: Financial statements are useful and timely

Reliability: Financial statements are verifiable

Comparability: Accounting information can be compared to other colleges and universities

Accounting Elements:



Assets:

Resources that CSU owns and that provide future economic benefit

- Prepaid expenses (1740)
- Receivable (14XX)
- Inventories (15XX)
- Equipment (18XX)

Liabilities:

Obligation against CSU's assets for past events

- Accounts Payable (2101)
- Unearned Revenue (2590)

Expenses:

Actual costs as the result of ongoing operations

- Salaries and Fringe (5xxx)
- Supplies (lab & office) (62xx)
- Repairs & Maintenance (66xx)

Revenues:

Actual cash or cash equivalent as the result of ongoing operations

- External Sales (43XX-44XX)
- Internal Revenues (48XX)
- Gifts (41xx)
- Tuition and Fees (43xx)

ACCOUNTING ELEMENTS & KUALI OBJECT CODE CLASSIFICATIONS

KFS Object Code Classification	Acctg Element Type	Object Code Normal Balance	Object Codes Commonly Used
1XXX	Asset	Debit	Cash (1100) Receivables (14xx) Capital Assets (18xx)
2XXX	Liability	Credit	Accounts Payable (21xx)
3xxx	Beginning Balance	Credit	Beginning Fund Balance (3000)
4XXX 9900 9904	Revenue	Credit	External Revenue (43xx-44xx) Internal Revenue (48xx-49xx) Transfer Income (9900, 9904-Plant)
5XXX – 6XXX 7xxx-8xxx 9902, 9905	Expense	Debit	Salary & Fringe (5xxx) General Supplies (62xx) General Services (66xx) COGS, Equipment (7xxx-8xxx) Transfer Expense (9902, 9905-Plant)

Debits and Credits – The Balancing Act



Debits and Credits represent the two sides of each transaction in a double entry accounting system



Must be at least one Debit (D) and one Credit (C) in every transaction to keep the accounting equation in balance



In Kuali, most documents show a "FROM" and "TO" rather than a "Debit" or "Credit" to make it easier for non-accountant users

BASICS OF KUALI "FROM/TO" ACCOUNTING

FROM → WILL DECREASE ANY ACCOUNT/OBJECT CODE

TO → WILL INCREASE ANY ACCOUNT/OBJECT CODE

Assets/ Expense	
Debits	Credits
	
Increase	Decrease

Liability/ Revenue	
Debits	Credits
	
Decrease	Increase

Account type	Normal Balance	Increase	Decrease
Asset	Debit	Debit	Credit
Expense	Debit	Debit	Credit
Liability	Credit	Credit	Debit
Revenue/Income	Credit	Credit	Debit

BASICS OF KUALI "FROM/TO" ACCOUNTING

ASSETS

Increase an Asset → Debit or **To**
Decrease an Asset → Credit or **From**



Account type	Normal Balance	Increase	Decrease
Asset	Debit	Debit	Credit

LIABILITIES

Increase a Liability → Credit or **To**
Decrease a Liability → Debit or **From**



Account type	Normal Balance	Increase	Decrease
Liability	Credit	Credit	Debit

REVENUES

Increase a Revenue → Credit or **To**
Decrease a Revenue → Debit or **From**



Account type	Normal Balance	Increase	Decrease
Revenue/Income	Credit	Credit	Debit

EXPENSES

Increase an Expense → Debit or **To**
Decrease an Expense → Credit or **From**



Account type	Normal Balance	Increase	Decrease
Expense	Debit	Debit	Credit

KUALI "FROM/TO" EXAMPLE #1

An expense was incorrectly charged to the wrong expense object code 6225. To correct the object code we need to enter the following:

FROM: To **decrease** the expense from the wrong object code (OC 6225)

TO: To **increase** the expense to the correct object code (OC 6601)

FROM											
HIDE DETAILS IMPORT LINES											
*CHART	*ACCOUNT	SUB-ACCOUNT	*OBJECT	SUB-OBJECT	PROJECT	ORG REF ID	*AMOUNT	*REF ORIGIN CODE	*REF NUMBER	LINE DESCRIPTION	ACTIONS
CO							0.00				+
Colorado State...											
1	CO	1339270	6225				539.00	01	1234567		⚖️ ↺ 🗑️
Colorado State...	Estep UIRS		Computer Hard...								
							TOTAL:	539.00			

TO											
HIDE DETAILS IMPORT LINES											
*CHART	*ACCOUNT	SUB-ACCOUNT	*OBJECT	SUB-OBJECT	PROJECT	ORG REF ID	*AMOUNT	*REF ORIGIN CODE	*REF NUMBER	LINE DESCRIPTION	ACTIONS
CO	1339270		6601				539.00	01	1234567		+
Colorado State...	Estep UIRS		General Services								
1	CO										⚖️ ↺ 🗑️
Colorado State...											

KUALI "FROM/TO" EXAMPLE #2

Receipts from customers were deposited (Credited) into an expense object code (OC 6201) that should have been recorded as revenue (OC 4380). To correct the error we need to enter the following:

TO: To **increase** (Debit) the expense to remove the credits (OC 6201)

TO: To **increase** (Credit) the revenue to the correct object code (OC 4380)

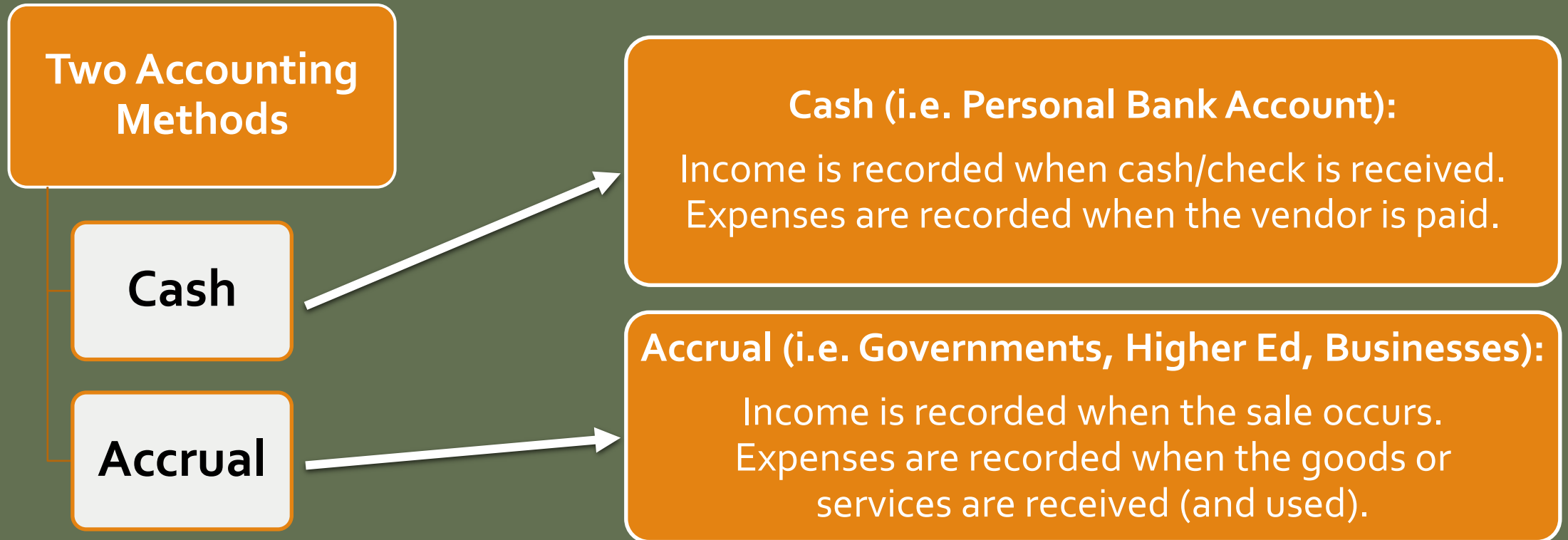
TO

HIDE DETAILS IMPORT LINES

	*CHART	*ACCOUNT	SUB-ACCOUNT	*OBJECT	SUB-OBJECT	PROJECT	ORG REF ID	*AMOUNT	*REF ORIGIN CODE	*REF NUMBER	LINE DESCRIPTION	ACTIONS	
	CO Colorado State...	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>			
1	CO Colorado State...	2702200 Ram Welcome:C...	<input type="text"/>	4380 Other Sales+Ser...	<input type="text"/>	<input type="text"/>	<input type="text"/>	100.00	01	1234567			
2	CO Colorado State...	2702200 Ram Welcome:C...	<input type="text"/>	6201 General Supplies	<input type="text"/>	<input type="text"/>	<input type="text"/>	100.00	01	1234567			
								TOTAL:	200.00				

ACCRUAL ACCOUNTING

ACCRUAL ACCOUNTING



GASB establishes accounting and financial reporting standards for government units. Since governments are required to follow GASB standards, CSU is required to use the **Accrual Accounting** method.

Accruals - Assets

Accruals - Liabilities

Prepaid Expenses (Object Code 1740)

- Service contracts
- Registration Expenses
- Airline tickets for next year's travel
- Note: This would reduce your current year expense and move the expense to the next fiscal year

Unearned Revenue (Object Code 2590)

- Revenue received in FY20, but earned in FY21
- Sports/Youth camps paid in advance for next fiscal year
 - Special Course Fees paid in June for summer semester ending in August
 - Football season tickets sold in June

Other Receivables (Object Code 1437)

- Lab test work complete for external client, but revenue not received by June 30th
- New Student Orientation attended in June, but money not received until after June 30th

Year-end Payables (Object Code 2103)

- Expense incurred in FY20, but not paid until FY21
- Travel occurred June 23rd – June 30th, but Travel Reimbursement not issued until July
 - Service Agreement for FY20, not paid until FY21

CSU SUB-FUND TYPES

CSU Sub-Fund Types

Activities are assigned to a **Fund Groups** based on the type of activity involved.

Sub-funds further categorize and define the funds based on the type, purpose or source of funds that are found in the account.



Some commonly used sub-funds include:

EG Fund – 13XXXXX : Appropriated funds related to Instruction and Administration.

RARSP Fund – 16XXXXX: Allocations to departments of F&A costs is received in the RARSP fund accounts to encourage and support research and scholarly activities.

CONTEd & DCESUP Fund – 12xxxxx: These funds used to account for revenue and expenses related to providing continuing education

RECHAR Funds– 21xxxxx: The purpose of these funds is to provide internal services to the University. Requires an approved business plan and billing rates.

GENOP Funds– 22xxxxx: The purpose of these funds is to sell goods and services to students, faculty, staff and the external community

SPONPR Funds – 53xxxxx: The purpose of these funds is to record federal, state and private contracts and grants.

Gift Funds – 64xxxxx: Revenue is limited to gifts and investment income earned on accumulated gifts.

Plant Funds– 77xxxxx: Used for construction related projects on campus. Facilities will be involved whenever 77 accounts are used.

CALCULATING AVAILABLE BALANCES

Budget vs Self Funded (Cash)

Budget Based Accounts

EG (13 Accounts)

RARSP (16 Accounts)

CSFS (19 Accounts)

EXTEN (Some 17 Accounts)

PVM (Some 14 Accounts)

Budget Based Accts: Calculate available balance based off of Budget (e.g. Education and General funds).

$\text{Budget} - \text{Actual} - \text{Encumbrances} = \text{Available Balance}$

Self Funded Accounts

GENOP (22 Accounts)

DCESUP (12 Accounts)

CONTED (12 Accounts)

ONLPL (12 Accounts)

AUX (26 Accounts)

ATHLET (26 Accounts)

Self-Funded (Cash Based) Accts: Calculate available balance based off of fund balance.

$\text{Assets (1xxx)} - \text{Liabilities (2xxx)} = \text{Available Balance}$

Budget Based Accounts:
Use Balances by Consolidation

Self-Funded (Cash) Based Accounts:
Use Available Balances

The screenshot displays the Kuali Financials application interface. On the left is a dark navigation sidebar with the Kuali logo and the word "Financials". The sidebar contains a "HOME" link, a "Jump to..." search box with "Ctrl+K" shortcut, and a list of menu items: ACCOUNTING, ACCOUNTS RECEIVABLE, AUTOMATED JOURNAL VOUCHER, BALANCE INQUIRIES (highlighted with a yellow box), BUDGET CONSTRUCTION, CAPITAL ASSETS, CHART OF ACCOUNTS, PRE-DISBURSEMENT, PROCUREMENT & ACCOUNTS PAYABLE, and SYSTEM. On the right, the "Balance Inquiries" page is shown under the heading "ACTIVITIES". It lists several options: Available Balances, Balances by Consolidation, Cash Balances, General Ledger Balance, General Ledger Entry, General Ledger Pending Entry, and Open Encumbrances. Two yellow arrows originate from the "BALANCE INQUIRIES" menu item and point to "Available Balances" and "Balances by Consolidation" in the main content area.

Available Balance
Self funded cash based accounts

Balance by Consolidation
Budget based accounts

Displays balances by account and object code.
Calculate balances in Self funded (cash based) accounts one of two ways:

Displays the total income and total expenses in an account, rolled up by a consolidation code.
Calculate the available balance in budget based accounts.

Assets
- Liabilities
Available Balance

OR

Beginning Fund Balance
+ Revenues
- Expenses
+ Transfers In
- Transfers Out

Ending Fund (Available) Balance

Budget Amount
- Actuals Amount
- Encumbrances Amount
Ending Fund (Available) Balance

Available Balances Example – Can you determine the available balance in self-funded account 2233300?

kuali Financials Action List

Available Balances Lookup ⓘ

* Fiscal Year:

* Account Number:

Object Code:

Consolidation Option:
 Consolidation
 Detail
 Exclude Sub-Accounts

* Chart Code:

Sub-Account Number:

Sub-Object Code:

Include Pending Ledger Entry:
 No
 Approved
 All

Search Results

Fiscal Year	Chart Code	Account Number	Sub-Account Number	Object Code	Sub-Object Code	Budget Amount	Actuals Amount	Encumbrance Amount
2020	CO	2233300	*ALL*	1100	*ALL*		0.00	14,349.39
2020	CO	2233300	*ALL*	2100	*ALL*		0.00	0.00
2020	CO	2233300	*ALL*	3000	*ALL*		0.00	6,337.44
2020	CO	2233300	*ALL*	4378	*ALL*	8,000.00		0.00
2020	CO	2233300	*ALL*	4392	*ALL*		0.00	12,410.96
2020	CO	2233300	*ALL*	5581	*ALL*		0.00	2,838.00
2020	CO	2233300	*ALL*	5582	*ALL*		0.00	788.94
2020	CO	2233300	*ALL*	5611	*ALL*		0.00	672.00
2020	CO	2233300	*ALL*	5612	*ALL*		0.00	7.40
2020	CO	2233300	*ALL*	6001	*ALL*		0.00	61.56
2020	CO	2233300	*ALL*	6600	*ALL*	8,000.00		0.00
2020	CO	2233300	*ALL*	6622	*ALL*		0.00	3.45
2020	CO	2233300	*ALL*	6649	*ALL*		0.00	27.66

Export options: CSV | Spreadsheet | XML

Assets (1xxx) = \$14,349.39
 - Liabilities (2xxx) = \$0

Available Balance = \$14,439.39



Calculate the Available Fund Balance by:

Beginning Fund Balance (3000)
 + Revenues (4XXX)
 - Expenses (5XXX-gXXX)

Ending (Available) Fund Balance

To calculate the ending fund balance = Assets (1xxx) - Liabilities (2xxx)

Balance By Consolidation Example – Can you determine the available balance in Budget Based account 1322000?

Balances By Consolidation Lookup ?

* Fiscal Year: X ?

* Chart Code: ?

* Account Number: ?

Sub-Account Number: ?

Consolidation Option: Consolidation Detail Exclude Sub-Accounts

Include Cost Share Sub-Accounts: Include Exclude

Include Pending Ledger Entry: No Approved All

Search Results ^{1-3 of 3}

Fiscal Year	Chart Code	Account Number	Sub-Account Number	Reporting Sort Code	Consolidation Code	Lookup By Level	Budget Amount	Actuals Amount	Encumbrance Amount	Variance
2020	CO	1322000	*ALL*	B	CMPN	Drill Down	1,019,507.00	460,448.08	424,232.18	134,826.74
2020	CO	1322000	*ALL*	B	GENX	Drill Down	541,407.00	240.00	0.00	541,167.00
2020	CO	1322000	*ALL*	B	TRVL	Drill Down	0.00	0.00	86.00	(86.00)

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

Totals

Type	Budget Amount	Actuals Amount	Encumbrance Amount	Variance
Income		0.00	0.00	0.00
Income From Transfers		0.00	0.00	0.00
Total Income		0.00	0.00	0.00
Expense	1,560,914.00	460,688.08	424,318.18	675,907.74
Expense From Transfers		0.00	0.00	0.00
Total Expense	1,560,914.00	460,688.08	424,318.18	675,907.74

Ending Fund (Available) Balance = Total Budget – Total Actuals – Encumbrances

Budget = \$1,560,914
 - Actuals = \$460,688.08
 - Encumbrances = \$424,318.18

Ending Fund Balance = \$675,907.74

KUALI FINANCIAL SYSTEM

OVERVIEW OF THE KUALI FINANCIAL SYSTEM



DEVELOPED BY AND
FOR HIGHER
EDUCATION



CONSOLIDATED
FINANCIAL SYSTEM



ELECTRONIC ROUTING
APPROVAL PROCESS
(ROUTE LOG)



BUILT IN CHECKS AND
BALANCES THUS
REDUCING MISTAKES



CREATES AN AUDIT
TRAIL



KUALI (KFS) IS THE
SYSTEM OF RECORD

KUALI – THE OVERVIEW

Action List and Document Search Sections

Home Button

The screenshot shows the KUALI Financials interface. At the top left is the 'kuali | Financials' logo. To the right of the logo is a navigation bar containing 'Action List' and 'Doc Search' icons. Below the logo is a yellow banner with the text 'This is a test environment' and a 'Back Door ID' field. On the left side is a dark grey 'Side Menu' with a search box 'Jump to...' and a list of menu items: HOME, ACCOUNTING, ACCOUNTS RECEIVABLE, AUTOMATED JOURNAL VOUCHER, BALANCE INQUIRIES, BUDGET CONSTRUCTION, CAPITAL ASSETS, CHART OF ACCOUNTS, PROCUREMENT & ACCOUNTS PAYABLE, SYSTEM, TRAVEL, VENDOR, HELP, and ABOUT. The main content area is titled 'Home' and features a 'MESSAGE OF THE DAY' section with a message: '~~~~This is the QA 1 Environment~~~~ _____ ~~~~ Cloned from Prod on 08/29/19~~~~'. Below this is a 'My Favorites' section titled 'ACTIVITIES' with a list of items: Adjustment/Accrual Voucher, Available Balances, Balances by Consolidation, and Year End Journal Voucher. Callouts point to the 'Home' button in the top right, the 'MESSAGE OF THE DAY' section, the 'ACTIVITIES' section, the 'Side Menu', and the 'Action List' and 'Doc Search' sections.

Message of the Day

Bookmarked Favorites

Side Menu

SIDE MENU FEATURE

HOME

Jump to... Ctrl+K

ACCOUNTING

ACCOUNTS RECEIVABLE

AUTOMATED JOURNAL VOUCHER

BALANCE INQUIRIES

BUDGET CONSTRUCTION

CAPITAL ASSETS

CHART OF ACCOUNTS

CONTRACTS & GRANTS BILLING

PRE-DISBURSEMENT

PROCUREMENT & ACCOUNTS PAYABLE

SYSTEM

TRAVEL

VENDOR

1099

Accounting

ACTIVITIES

- Advance Deposit
- Adjustment/Accrual Voucher
- Budget Adjustment
- Cash Receipt
- Distribution Of Income And Expense
- General Error Correction
- Indirect Cost Adjustment
- Internal Billing
- Internal Order
- Intra-Account Adjustment
- Journal Voucher
- Non-Check Disbursement
- Pre-Encumbrance
- Single Sided Budget Adjustment
- Transfer Of Funds
- Work Order Authorization
- Internal Supplier Id

REFERENCE

KFS Training Guides

Become familiar with Side Menu to find needed items in Kualu

"JUMP TO" SEARCH FEATURE

HOME

Jump to... Ctrl+K

ACCOUNTING

ACCOUNTS RECEIVABLE

AUTOMATED JOURNAL VO

BALANCE INQUIRIES

BUDGET CONSTRUCTION

CAPITAL ASSETS

CHART OF ACCOUNTS

PRE-DISBURSEMENT

PROCUREMENT & ACCOUNTS PAYABLE

Home

MESSAGE OF T

Users may have to
be directed to BFS

Favorites

ACTIVITIES

Account

Available Balances

Balances by Consolidation

Shop |

Shop Catalogs

Procurement & Accounts Payable

↑ ↓ to navigate ↵ to select ctrl ↵ to open in a new tab esc to dismiss

Open this from anywhere by typing Ctrl+K

"Jump To" is an easy way to find an item in Kual

"MY FAVORITES" FEATURE

HOME

Jump to... Ctrl+K

ACCOUNTING

ACCOUNTS RECEIVABLE

AUTOMATED JOURNAL VOUCHER

BALANCE INQUIRY

BUDGET CO

CAPITAL AS

CHART OF ACC

PRE-DISBURSEMENT

Accounting

ACTIVITIES

- Advance Deposit
- Adjustment/Accrual Voucher
- Budget Adjustment
- Cash Receipt
- Distribution Of Income And Expense
- General Error Correction

If at some point a favorite is no longer needed, it can be deleted by hovering over the item and deleting it in the favorites menu

You can add a document to favorites by hovering over the document and clicking the heart.

ACTION LIST

Click into
"Preferences"
to change how
your action list
looks

Action List

preferences refresh filter help desk action list login

Action List | [Outbox](#)

80 items retrieved, displaying 1 to 50. [First/Prev] 1, 2 [Next/Last]

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>	<u>Group Request</u>	<u>Log</u>
20592204	Transfer Of Funds	Transfer Of Funds - F&A Distribution FY19	ENROUTE	APPROVE	MEDINA, GINGER L		09:58 AM 09/25/2019	08:21 AM 12/17/2019	CampusServices	
20868481	General Error Correction	General Error Correction - Chargeback adjustments 2019-12-10	ENROUTE	APPROVE	Lavin, Lucinda		11:25 AM 10/21/2019	06:35 AM 12/13/2019	CampusServices	
21109716	Transfer Of Funds	Transfer Of Funds - TF FROM ASG TO SOF	ENROUTE	APPROVE	LOWELL, SARAH R		10:13 AM 11/13/2019	04:47 PM 12/04/2019	CampusServices	
21112979	General Error Correction	General Error Correction - CORRECT OBJECT CODE PRESIDENT'S OFFICE	ENROUTE	APPROVE	ZORDEL-CASAREZ, SHELBY B		12:21 PM 11/13/2019	10:24 AM 12/18/2019	CampusServices	

- Action List is where you will review and approve documents awaiting your approval before finalizing. You can also acknowledge, FYI, or Complete documents that are in the action list.
- Sort by underlined column headers by clicking on them
- Click on Document ID to get into the document for review/approval
- If the "Group Request" column is blank, the document is only in your Action List. If a group is listed, the document is sitting in multiple action lists













DOC SEARCH OPTION

Click "Doc Search" to look for documents in KFS

Document Search ?

detailed search clear saved searches

Searches

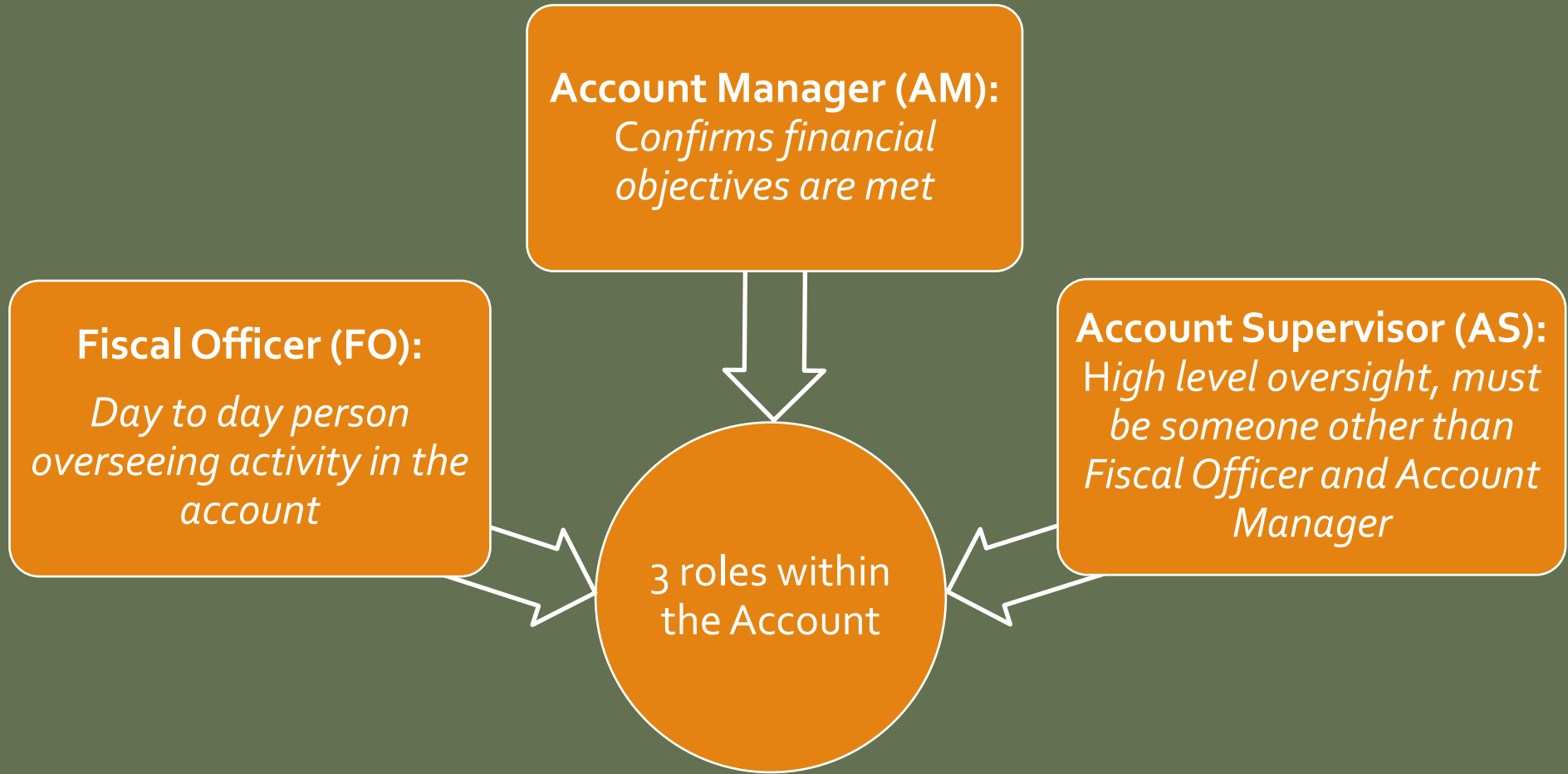
Document Type:	<input type="text"/>	  
Initiator:	<input type="text"/>	  
Document Id:	<input type="text"/>	
Date Created From:	<input type="text"/>	 
Date Created To:	<input type="text"/>	 
Name this search (optional):	<input type="text"/>	

- Search for a specific document (GEC, DI, PO, etc.) by putting the Document Type in and clicking out of the Document Type field, this will give you more fields to search on.
- Search by Initiator, Document ID, or filter the search with dates.

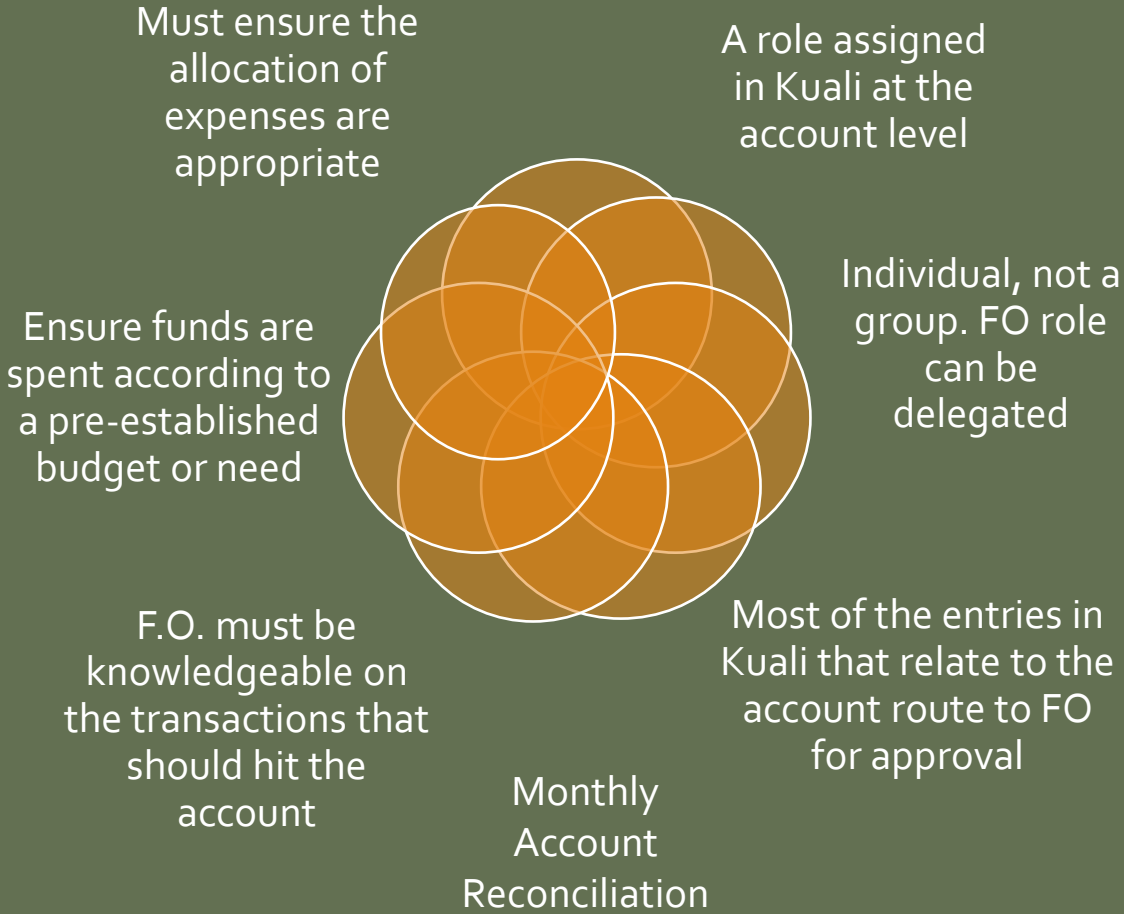
COMMON DOCUMENT TYPES TO SEARCH BY

- Account (ACCT)
- Adjustment Voucher (AV)
- Advance Deposit (AD)
- Budget Adjustment (BA)
- Cash Receipts (CR)
- Disbursement Voucher (DV)
- Distribution of Income/Expense (DI)
- General Error Correction (GEC)
- Internal Billing (IB)
- Internal Order (IO)
- Payment Request (PREQ)
- Pre-Encumbrance (PE)
- Purchase Order (PO)
- Transfer of Funds (TF)
- Work Order Authorizations (WOA)
- Travel Authorization (TA)
- Travel Reimbursement (TR)
- Effort Certification (ECD)
- Asset Maintenance (CAMM)

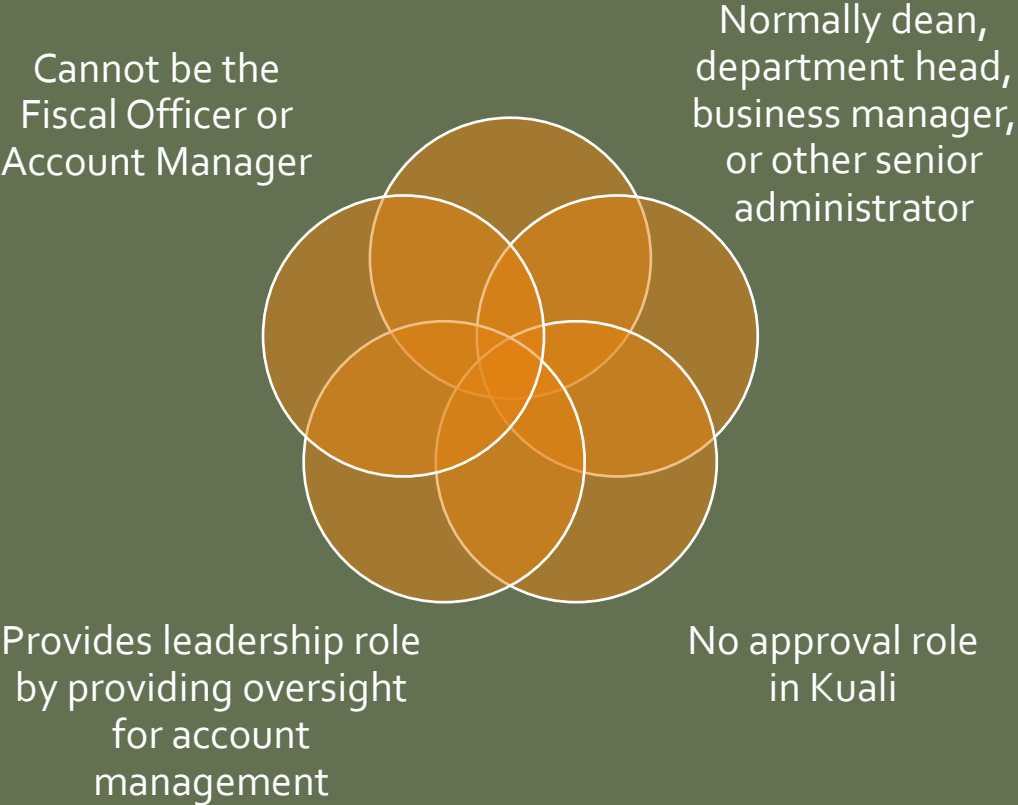
RESPONSIBILITIES AND APPROVALS IN KUALI



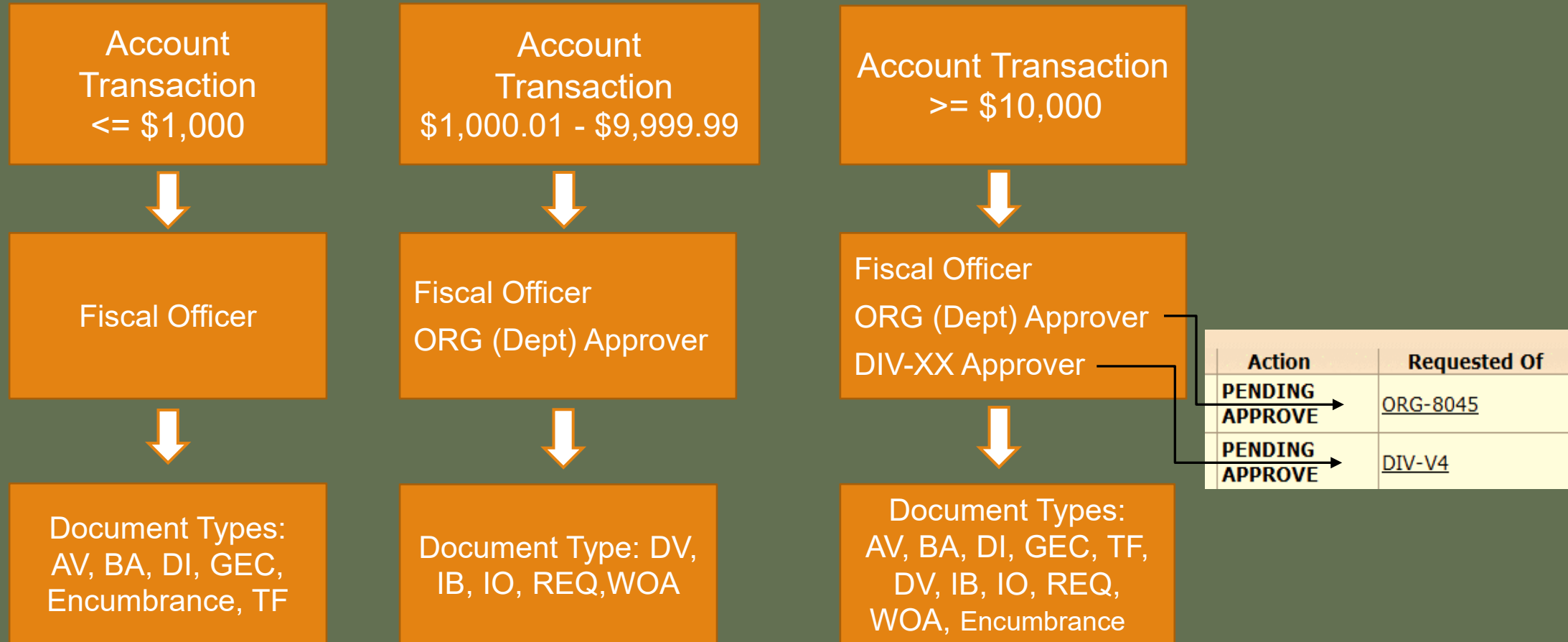
Fiscal Officer (FO) Responsibilities



Account Supervisor (AS) Responsibilities



DOCUMENT APPROVAL LIMITS



Account Transaction
≤ \$1,000

Fiscal Officer

Document Types:
AV, BA, DI, GEC,
Encumbrance, TF

Account Transaction
\$1,000.01 - \$9,999.99

Fiscal Officer
ORG (Dept) Approver

Document Type: DV,
IB, IO, REQ, WOA

Account Transaction
≥ \$10,000

Fiscal Officer
ORG (Dept) Approver
DIV-XX Approver

Document Types:
AV, BA, DI, GEC, TF,
DV, IB, IO, REQ,
WOA, Encumbrance

Higher Approver Levels in Kualu

Organizational (ORG) Approver

a.k.a. Department Approver

Multiple people can be in an ORG group

Only 1 person in the ORG group needs to approve

ORG approver is granted via a form

ORG approver is normally a business manager, department manager, or other senior administrator

Division (DIV-XX) Approver

Multiple people can be in a DIV-XX group

Only 1 person in the DIV-XX group needs to approve the document

DIV approver access is granted via a form

DIV approver is typically a dean, department head, or other senior administrator

Individual can be in both the ORG and DIV-XX roles for smaller departments, but should not be the Fiscal Officer

CAMPUS SERVICES REPRESENTATIVES

Kris King, Manager – 491-6752

Summer Leaming, Representative – 491-2801

Thank you for listening!
Any questions?

