Kuali Financial System Upgrade Release Notes

We’re excited to introduce you new features that come alongside the KFS Upgrade. The update does not significantly impact the basic structure or functionality of KFS e-documents. Nor will there be significant changes to things like workflow, the General Ledger, or the Chart of Accounts as a result of this update. But while most things are staying the same, there are several new changes to the system. Here are some of new features that are coming:

The most significant change in the new version of KFS is the “look and feel.” The color palette and some fonts have changed in this upgraded version of the software. The underlying format of the tabs and fields in the documents remain the same though, and we expect most users will adapt very quickly.

Current Main Menu

New Main Menu

The main screen has been changed extensively in this upgrade. Active links have moved from the main menu into a tab driven setup. This reduces clutter on the main menu.
New Navigation Side Bar and Search

Clicking on the Tabs on the left side of the screens opens the available document types or links that are available to the user.

The tabs in the Side Menu work to condense down the available links in KFS. Each tab contains links to eDocs and lookups. Side Menu tabs and links within the tabs will populate based on the individual user’s access. For example, users who don’t have access to the Advance Deposit eDoc will not see a link for it in their Accounting tab.

Jump To (Search)

The Jump To feature allows users to search on common eDocs or lookups more easily. Begin typing to get a list of available links.
KFS users can now create a custom portlet with the eDocs and Lookups that they use most using the My Favorites feature. The My Favorites portlet located on the main screen will not be visible until a favorite eDoc or Lookup has been selected. To select a favorite, users can hover their mouse over a document type and select the heart icon that appears.

After the first favorite is selected, the My Favorites box will appear in the middle of the user’s page on the home screen. Users can continue to add favorites by selecting the heart icon next to the desired eDoc or Lookup.

Users can remove items from their My Favorites portlet by selecting the X icon next to the item they want to remove.
Doc Search and Action List

The Doc Search and Action List will be in the upper right-hand corner on the main page.

The look and design of the Action List for document approvers will not change.

The look and design of the Doc Search will not change. However, with Kuali Financials there is no longer the Custom Doc Search links like in previous versions. Users will need to use the Document Type search field to populate what document type the user wants to search on. Users can also refine their search by using the detailed search button at the top of the screen.
Home and Navigation

The Kuali logo works as a home button when navigating within the application. The user can click on the Kuali logo and be redirected back to the main page. If an eDoc is open and the user decides to go back to the main menu, a warning message will appear to confirm that action.
The Collapse Navigation feature allows the user to “hide” the side menu and expand the screen and document they are working on.

Expanding the screen removes tab menu and enlarges the document and reduces screen clutter. Users can toggle back and forth by clicking on the arrow key. This will helpful for users if printing is desired.
**Multiple Windows**

The new user interface for KFS will limit the number of windows/pages that automatically open. Users can still open multiple windows but will need to right click on mouse to open in a new window. This is browser driven.

**External Links**

The updated version of KFS will allow administrators to link to websites outside of the Kuali environments. Links to user guides and business process will be updated over time and can serve as a reference for users when completing documents.
To print, right click from your mouse and click on the Print action.

Action will take you to a print function within your browser. Consider using the Landscape layout.

KFS is designed to be a paperless system, and we encourage all users to avoid printing KFS documents whenever possible. The KFS database acts as the system of record and a repository for original financial documents, and therefore, KFS users should rarely if ever need to print documents. If printing is desired, note that KualiCo is aware of printing limitations within Internet Explorer and Microsoft Edge browsers. They have advised users move to Chrome or Firefox if printing is desired. There will be no technical changes for Internet Explorer or Microsoft Edge in the near future.
All functionality of KFS documents have remained the same. However, each document was redesigned with a new look. Buttons/icons were updated. Action buttons are now stationary on the page. The addition of the import template link allows the user to download the current version of the import template for mass entry upload.
## Buttons/Icons on eDdocs

<table>
<thead>
<tr>
<th>Button Name</th>
<th>KFS 6.0</th>
<th>Kuali Financials</th>
<th>Button Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance Inquiry</td>
<td>bal inquiry</td>
<td></td>
<td>Will show the current balance of an account.</td>
</tr>
<tr>
<td>Copy/Copy Down</td>
<td>copy</td>
<td></td>
<td>In the General Error Correction this button will copy an expense from the From section to the To section. In the Travel Reimbursement this button will copy one day of Daily Expenses to the rest of the days in the Daily expense tab.</td>
</tr>
<tr>
<td>Add Accounting Lines</td>
<td>add</td>
<td></td>
<td>Once all required information has been entered accounting lines, selecting this button will add the accounting line to the edict.</td>
</tr>
<tr>
<td>Add</td>
<td>add</td>
<td></td>
<td>Once a line of data has been completed, selecting the Add button will add that data to the eDoc.</td>
</tr>
<tr>
<td>Open Requisition Accounting Lines</td>
<td><a href="#">show</a></td>
<td></td>
<td>In the Requisition eDoc this button will open the accounting lines for a line item that has been added.</td>
</tr>
</tbody>
</table>

The new design of KFS has updated icons within the application.
In Kuali Financials, the action buttons will be stationary at the bottom of the browser window. Users no longer need to scroll to the bottom of the document to access them. In addition, when pages refresh after a save action, the document will refresh and deliver the page to last user entry rather than roll the page to the top of screen in previous versions.

Import Templates

Clicking on the import template link will open a new window where a user can download the import template for the different document types. This can be used when creating a document with multiple entries. Please limit your lines to < 100 because of system performance issues.
Some areas of KFS will allow the user to open Links in a new tab. Hover over the link to find the icon and click to open information inside the link.

If the icon does not appear, user can right click on mouse and click on available options to open link from browser.
**Custom Doc Search**

The custom doc search that was available in KFS 6.0 will not be available in the KFS 7.0. Users will use the general doc search and populate the document type filed with the document type short name. BFS will provide a quick guide on the more popular document types in KFS. Doc search input will be case sensitive. Here is a sample of doc type names.

<table>
<thead>
<tr>
<th>Document Type Code</th>
<th>Document Name</th>
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<th>Document Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCT</td>
<td>Account</td>
<td>PCDO</td>
<td>Procurement Card</td>
</tr>
<tr>
<td>AD</td>
<td>Advance Deposit</td>
<td>PE</td>
<td>Pre-Encumbrance</td>
</tr>
<tr>
<td>BA</td>
<td>Budget Adjustment</td>
<td>PO</td>
<td>Purchase Order</td>
</tr>
<tr>
<td>CM</td>
<td>Credit Memo</td>
<td>PREQ</td>
<td>Payment Request</td>
</tr>
<tr>
<td>CR</td>
<td>Cash Receipt</td>
<td>PROJ</td>
<td>Project Code</td>
</tr>
<tr>
<td>DI</td>
<td>Distribution of Income and Expense</td>
<td>REQS</td>
<td>Requisition</td>
</tr>
<tr>
<td>DV</td>
<td>Disbursement Voucher</td>
<td>SB</td>
<td>Service Billing</td>
</tr>
<tr>
<td>GEC</td>
<td>General Error Correction</td>
<td>TA</td>
<td>Travel Authorization</td>
</tr>
<tr>
<td>IB</td>
<td>Internal Billing</td>
<td>TR</td>
<td>Travel Reimbursement</td>
</tr>
</tbody>
</table>

**File Attachment Size**

File attachment size will not change with KFS 7.0. Attachments are limited to 5MB each. Check your scanning resolution, Users should try to scan at 300 dpi as it will make the file much more manageable. Also, scan in black and white as that reduces the size of the file.
Accounting Line Review/Edit on REQS and PREQS as Fiscal Officer

To review and edit the accounting lines on REQS and PREQS, the FO will need to click on the icon to open the accounting lines to review and edit. If the FO changes an account that they are not an FO on, the document will error.

Browser Caching

KFS screen appears to have some of the prior version formatting. Your screen may look like a combination of Version 6 and Version 7. A hard refresh of your browser is needed. Use the above image to find the correct key sequence for your browser and operating system. Holding down the Ctrl button and hitting F5 appears to work in Chrome for a hard browser refresh. User will need to do it on the screen or document that has the issue.