

# 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)

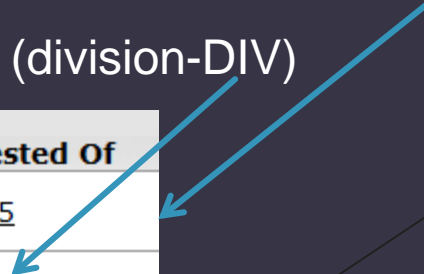
>=\$10,000

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>

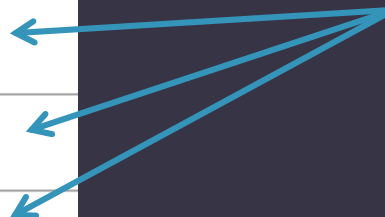
# Employee Leaving Department

- ▶ 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](mailto: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.

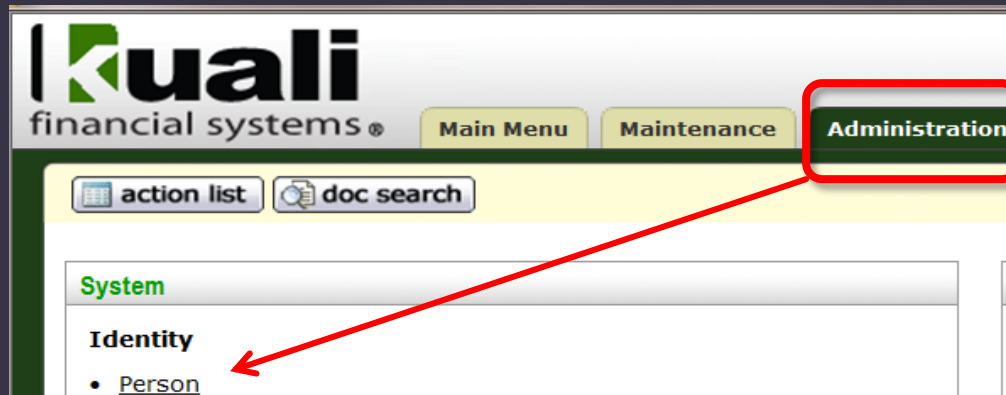
<b>Fiscal Officer Principal Name:</b>	<input type="text"/>		←
<b>Account Supervisor Principal Name:</b>	<input type="text"/>		←
<b>Account Manager Principal Name:</b>	<input type="text"/>		←



- ▶ 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

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

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

Privacy Preferences

Membership

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](mailto: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"/>
<b>Account Number:</b>	<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	
<a href="#">edit</a>	<a href="#">copy</a>	CO	2702000	Preview Orientation	8011	NA	AUX	AEAF	Wenzler, Kerry M	Diehl, Vicki Lynn	Diqregorio, Gave Golter


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


# Changing Account Responsibility Roles


Click for person lookup


Account Responsibility	
Old	New
<b>Fiscal Officer Principal Name:</b> <a href="mailto:nakasone@colostate.edu">nakasone@colostate.edu</a> - Wenzler, Kerry M	<b>* Fiscal Officer Principal Name:</b> <input type="text" value="nakasone@colostate.edu"/> Wenzler, Kerry M
<b>Account Manager Principal Name:</b> <a href="mailto:vdiehl@colostate.edu">vdiehl@colostate.edu</a> - Diehl, Vicki Lynn	<b>* Account Manager Principal Name:</b> <input type="text" value="vdiehl@colostate.edu"/> Diehl, Vicki Lynn
<b>Account Supervisor Principal Name:</b> <a href="mailto:ggolter@colostate.edu">ggolter@colostate.edu</a> - Digregorio, Gaye Golter	<b>* Account Supervisor Principal Name:</b> <input type="text" value="ggolter@colostate.edu"/> Digregorio, Gaye Golter
<b>Income Stream Chart Of Accounts Code:</b> CO - Colorado State University	<b>Income Stream Chart Of Accounts Code:</b> <input type="text" value="CO - Colorado State University"/>
<b>Income Stream Account Number:</b> 1300000	<b>Income Stream Account Number:</b> <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
<b>Chart Code:</b> CO	<b>Chart Code:</b> CO
<b>Account Number:</b> 2702000	<b>Account Number:</b> 2702000
<b>Account Title:</b> Preview Orientation	<b>* Account Title:</b> <input type="text" value="Preview Orientation"/>
<b>Organization Code:</b> 8011	<b>* Organization Code:</b> <input type="text" value="8011"/>
<b>Campus Code:</b> MC - CSU Main Campus	<b>* Campus Code:</b> <input type="text" value="MC - CSU Main Campus"/>
<b>Account Effective Date:</b> 07/01/2009	<b>* Account Effective Date:</b> <input type="text" value="07/01/2009"/>
<b>Account Postal Code:</b> 80523	<b>* Account Postal Code:</b> <input type="text" value="80523"/>
<b>Account City Name:</b> FORT COLLINS	<b>* Account City Name:</b> <input type="text" value="FORT COLLINS"/>
<b>Account State Code:</b> CO	<b>* Account State Code:</b> <input type="text" value="CO"/>
<b>Account Street Address:</b> 8011 Campus Delivery	<b>* Account Street Address:</b> <input type="text" value="8011 Campus Delivery"/>
<b>Sub-Fund Group Code:</b> AUX	<b>* Sub-Fund Group Code:</b> <input type="text" value="AUX"/>
<b>Account Expiration Date:</b>	<b>Account Expiration Date:</b> <input type="text"/>
<b>Continuation Chart Code:</b> CO - Colorado State University	<b>Continuation Chart Code:</b> <input type="text" value="CO - Colorado State University"/>
<b>Continuation Account Number:</b> 2008011	<b>Continuation Account Number:</b> <input type="text" value="2008011"/>
<b>Closed?:</b> No	<b>Closed?:</b> <input type="checkbox"/>
<b>Labor Benefit Rate Category Code:</b>	<b>Labor Benefit Rate Category Code:</b> <input type="text"/>

## Account Responsibility \*

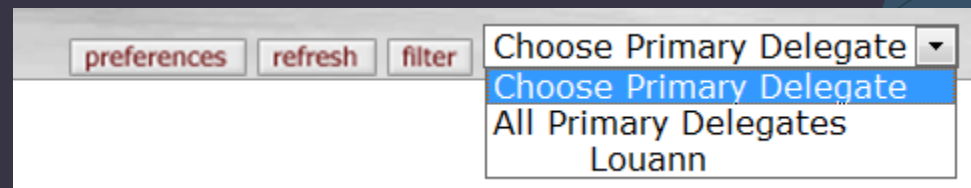
Old	New
<b>Fiscal Officer Principal Name:</b> <a href="mailto:nakasone@colostate.edu">nakasone@colostate.edu</a> - Wenzler, Kerry M	<b>* Fiscal Officer Principal Name:</b> <input type="text" value="nakasone@colostate.edu"/> Wenzler, Kerry M
<b>Account Manager Principal Name:</b> <a href="mailto:vdiehl@colostate.edu">vdiehl@colostate.edu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

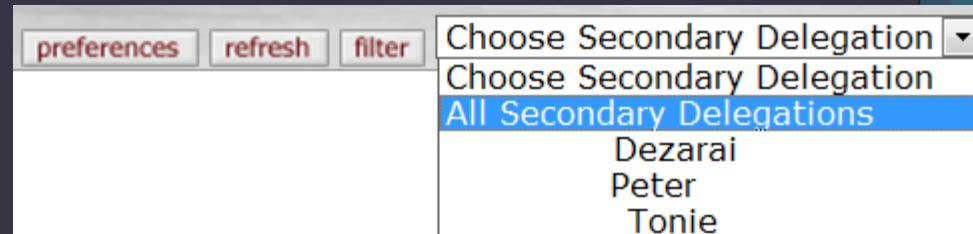


# Account Delegates

## ▶ 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](#)
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### Chart of Accounts

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- [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

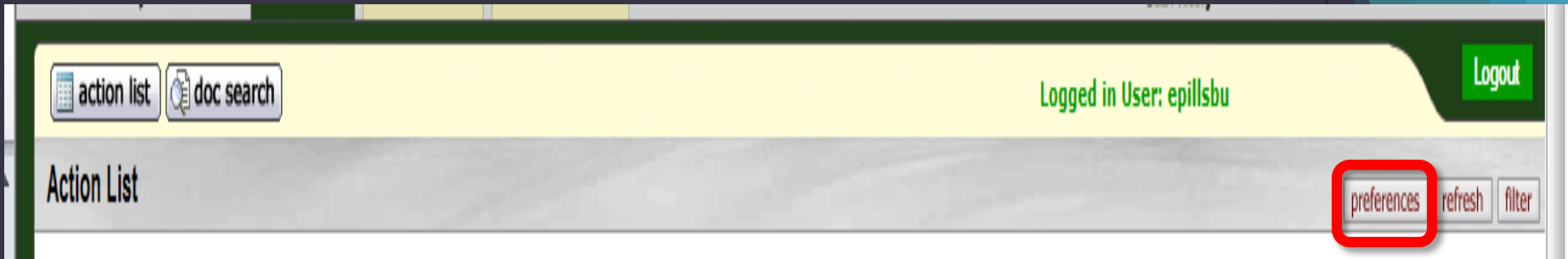
# Account Delegates

- ▶ 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 data-bbox="1116 1005 1141 1023" type="button" value="?"/>
Receive Primary Delegate Emails	<input checked="" type="checkbox"/>
Receive Secondary Delegate Emails	<input type="checkbox"/>
Delegator Filter	Secondary Delegates 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