Please complete all of the exercises below before attending any of the hands-on training sessions.

Note: If you are unable to perform any of the functions while logged in as yourself, you may impersonate using rlg02010. All staff registered for KFS hands-on training will have access in the training environment before classes begin.

How to Log Into KFS

1. Go to the kuali.uconn.edu website, and click on the link for the KFS Test Environment.
2. Click on the Main Page tab, and log in as yourself using your UConn NetID and password when prompted.
3. Impersonate someone else using this NetID: rlg02010
4. Click Logout to remove the impersonating ID
5. Close the browser window to log out of KFS completely.

Navigating the Main Menu

1. Log into the KFS Test Environment using the directions above.
2. Click on the action list button to see your action list.
3. Return to the Main Menu by clicking on the Main Menu tab.
4. In the Transactions sub-menu ~ Purchasing/Accounts Payable, click on the link for “Requisition.” A new requisition should be initiated. Scroll to the bottom and cancel. Click Yes when prompted.
5. In the Lookup and Maintenance sub-menu ~ Chart of Accounts, click on the link for “Account.” An Account Lookup Screen will open up.
6. Return to the Main Menu by clicking the “cancel” button.

E-Doc Basics

1. In the Transactions sub-menu ~ Financial Processing, click on the link for “Budget Adjustment.” A new BA will open up.
2. At the top right of the document, find the Doc Number, Status, Initiator, and Date and Time created.
3. Click on the “Collapse All” button to see all of the tabs.
4. Open the Document Overview tab by clicking on the “show” button.
5. Enter a Description (example: Reallocate salary budget to general exp).
6. Click the save button at the bottom of the e-doc. You should see “Document was successfully saved.”
7. Click “show” then “hide” for each of the tabs. Notice the fields that have an asterisk (*) next to them. These are required fields for these e-docs.

8. Close your e-doc by clicking the “close” button. Choose Yes when prompted.

9. Click on the action list button on the Main Menu. You should see your BA with an action requested of “Complete.” This means that the e-doc was started, but not yet submitted.

Using Field Searches in KFS

1. On the Main Menu ~ Lookup and Maintenance sub-menu ~ Chart of Accounts, click on Account. You will now be looking at the Account Lookup screen.

2. In the “Account Name” field, type *math* then click the search button. Your search results will be listed.

3. Click on an account number to open up the account record. Look at the account’s attributes - this is the equivalent to FRS screens 2, 6, and 9. Close the window.

4. On the Main Menu ~ Transactions ~ Financial Processing, click on Distribution of Income and Expense.

5. On the Accounting Lines tab “From” section, click on the magnifying glass next to Object. Now you will be looking at the Object Code Lookup screen.

6. In the Object Code Name field, type *supplies* and click the search button. From the search results, click the “return value” link in the left column next to 6775 Office Supplies. The object code will be returned to the DI.

7. On the Accounting Lines tab “To” section, click on the magnifying glass next to Object. Now you will be looking at the Object Code Lookup screen.

8. In the Historical Financial Object Code field, type 3140 (the FRS code for office supplies) and click the search button. Click the “return value” link in the left column to return the object code to the DI.

E-Doc Searches

1. Click on the Doc Search button. Type your own NetId in the Initiator field, then click search. A list of all e-docs that you have initiated will be listed.

2. Clear the previous search, and type “BA” in the Type field. All of the BA’s that were initiated today will be listed.

3. Change the Date Created From field to a previous date. The new search results will be much higher.


5. In the Account Number field, type 2922600, then click search. All of the requisitions coded to this account will be listed.

See you in Hands-On Training!!!