

Kuali Financial System (KFS) Action List/Route Log/Ad Hoc Routing September, 2009

- **Action List**

You receive action requests for KFS transactions through your Action List. Summary information about the documents in your Action List is provided, such as Document Type, Title, Route Status, the type of action requested of you, who initiated the document, when it was created and whether or not you've received this request because you are a Delegate or a member of a workgroup.

Your action list displays documents that you have initiated and saved, and any documents that are routed to you to approve, acknowledge or FYI.

Approve

This signifies, in the user's judgment, that the document represents a valid business transaction in accordance with institutional needs and policies.

Disapprove

This signifies, in the user's judgment, that the document does not represent a valid business transaction. A Disapprove action from any single approver prevents a document from ever posting to the GL. The system will prompt you to input a reason for your disapproval.

Acknowledge

This requires the individual to open the document and **acknowledge** the request; a 2 step process. An **acknowledge** request doesn't interrupt the normal routing of the document. Documents with a pending **acknowledge** action will post to the account once the normal approvals have taken place. A document is not held up for an outstanding acknowledgement.

FYI

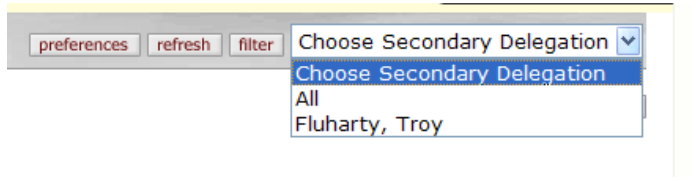
This request allows the individual to either:

- open the document and clear the request; a 2 step process, or
- clear the request without opening it; a 1 step process.

An **FYI** request doesn't interrupt the normal routing of the document. A document with a pending **FYI** action will post to the account once the normal approvals have taken place. A document is not held up for an outstanding FYI action.

- **Fiscal Officer Delegation**

To see the documents that you have been delegated look in the upper right hand corner of the action list and if there are any documents on any accounts that you have been delegated to you will see a dropdown list:



By choosing one of the options your action list will update with the documents that have been delegated to you.

- **Route Log**

The route log may be viewed at any time; once the document is saved, and there is at least one accounting line. The route log is divided into 4 tabs; Document ID, Actions Taken, Pending Action Requests, and Future Action Request.

Document ID – this includes an overview of the document. The document title, type of document, initiator and current status are displayed.

Actions Taken – this displays the history of the workflow actions for that document. The action taken, who took the action and the date & time the action occurred. Click **show** to drill down into the details of each action.

Pending Action Requests – this displays the next action to be taken on the document. The **Requested of** field may display a workgroup name (denoted as ORG, DIV, HOSP, etc.); click on that field to display approvers within that workgroup.

Future Action Requests - this displays any future approvals (and acknowledgements & FYI's) needed on this document. These requests appear in the order that they are to occur.

- **Ad Hoc Routing**

The Ad Hoc recipients tab allows you to interrupt the normal workflow routing of a document and include additional individuals in the routing path. These ad hoc recipients are in addition to the normal workflow approvers.

You may request an individual to **approve** your document; meaning the normal document routing is interrupted. That individual must approve the document before the normal routing of the document continues.

- Prior to adding an individual as an ad hoc approver, ensure that they are available to approve your document.
- Ad hoc approvals should be done infrequently, as the normal workflow approvals should suffice for most documents.

You may also request an individual to **acknowledge** your document or **FYI your** document. See detailed information about acknowledge and FYI actions in the Route Log section listed above.

Contact

Your Campus Services representative:

<http://busfin.colostate.edu/cs.aspx>