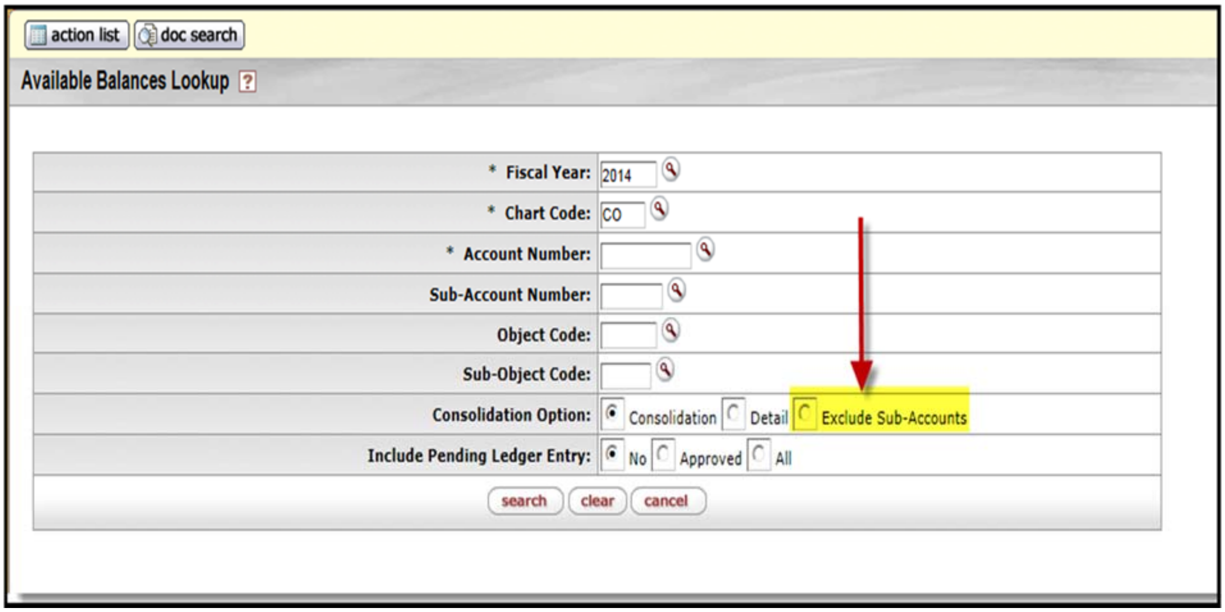
KFS 5.03 Upgrade

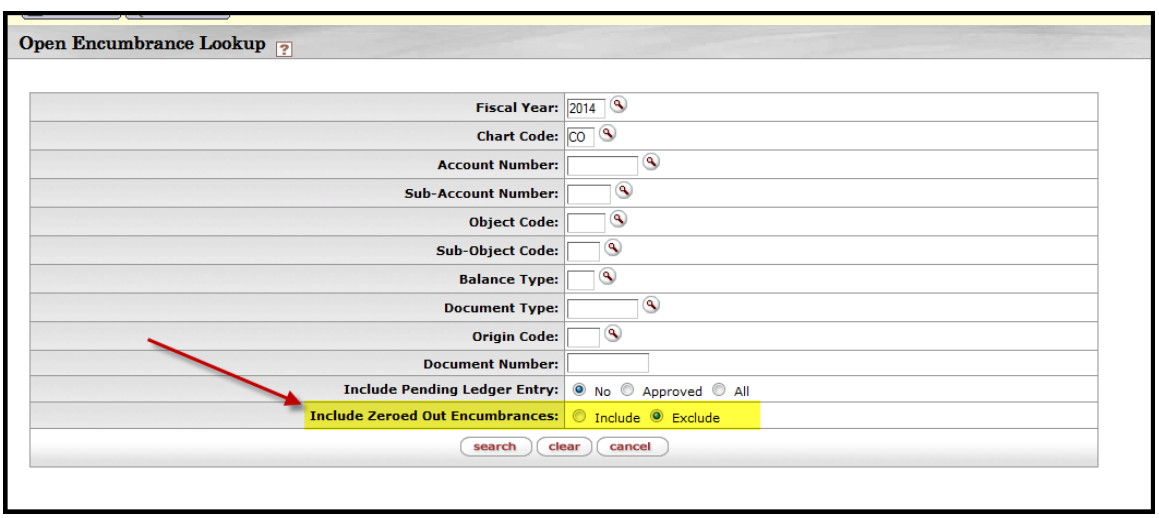
February 2014

Enhancements

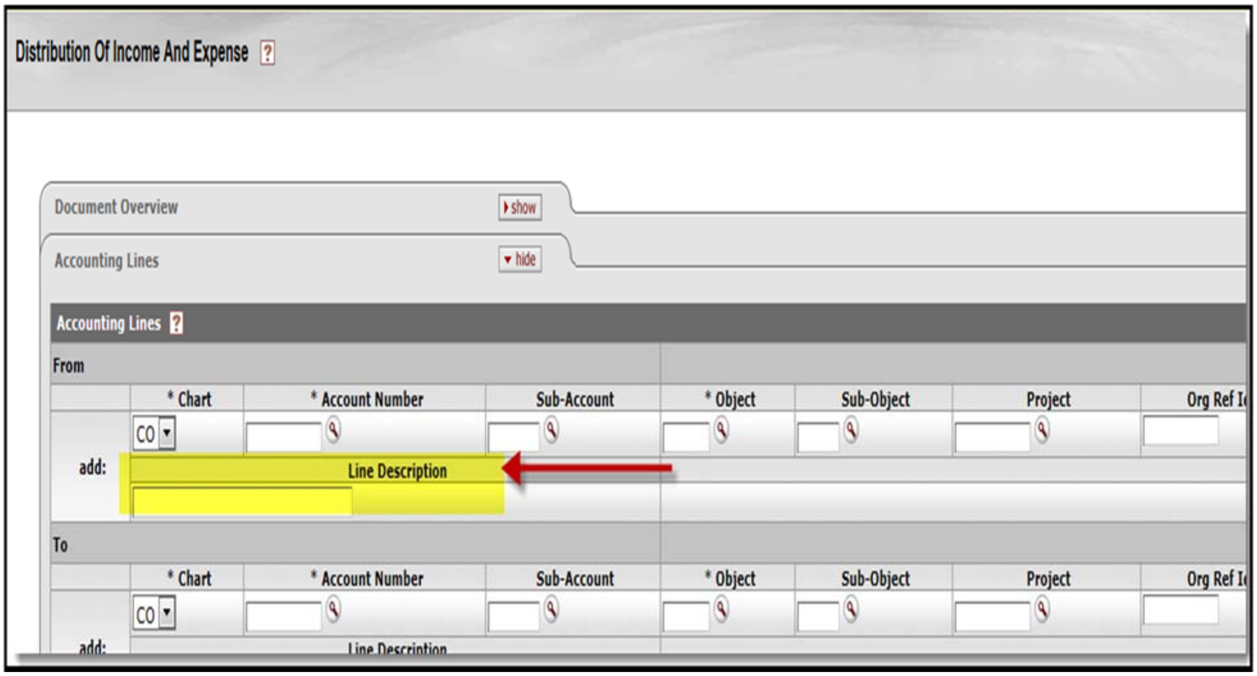
1. Consolidation option added to exclude sub-accounts on Balance Inquiries, limiting results to the main account.



2. Option added on the Open Encumbrance Lookup to include or exclude Zeroed Out Encumbrances.



3. Description line added to new documents (DI, IB, IO, SB, TF, PE, Pcard, WOA).



4. Updated import templates to include a column for Line Description.

- New versions of the import templates can be found under Guides and Documentation at:

http://kuali.colostate.edu/default.aspx

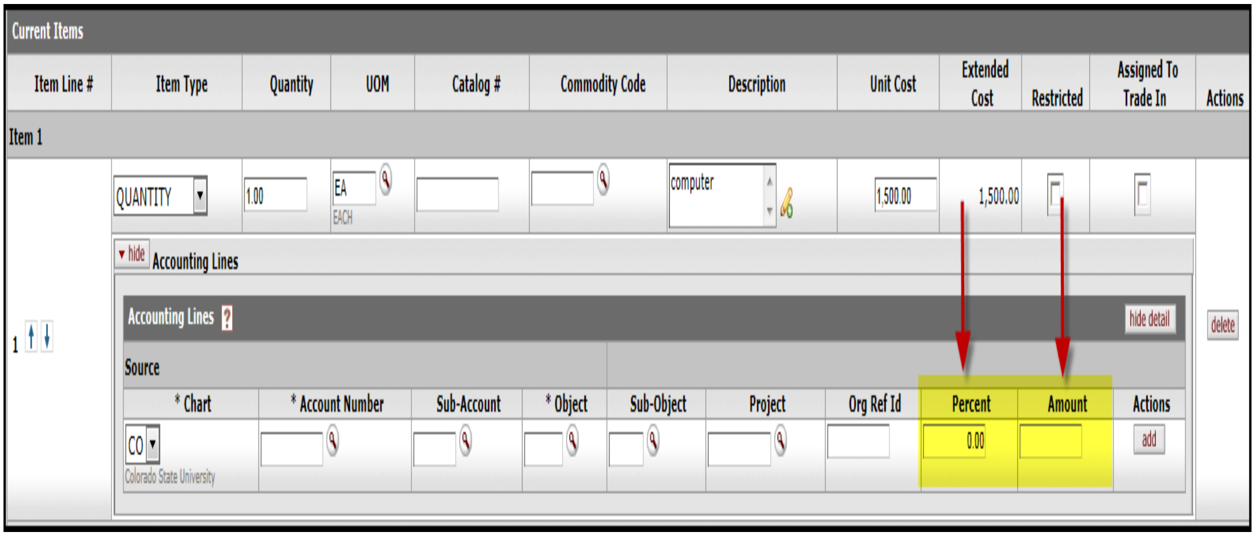
5. Initiator can recall a document routed but not yet acted upon by others (AD, AV, BA, CR, DV, DI, GEC, ICA, IB, IO, PE, SSBA, TF, WOA).

Initiator can do one of two things, 1. “Recall to action list” which will bring the document back to their action list to be modified and resubmitted or 2. “Recall and cancel” which will cancel the document.

6. Send an FYI to the Fiscal Officer on a PO amendment.

- When Procurement Services creates/submits a PO amendment, an FYI is sent back to the Fiscal Officer’s Action List.

7. Users can enter dollars or percentages on account strings on Requisitions.



- Initiator will need to click the "Calculate" button at the bottom of the page prior to submitting the Requisition.

8. Allow multiple capital transactions on financial documents.

- This enhancement will allow capital transactions to be moved between capital assets on a single document.
- Property Management will be conducting training on this enhancement throughout spring 2014.
- Access the training materials website: http://busfin.colostate.edu/prp.aspx under the Training option.

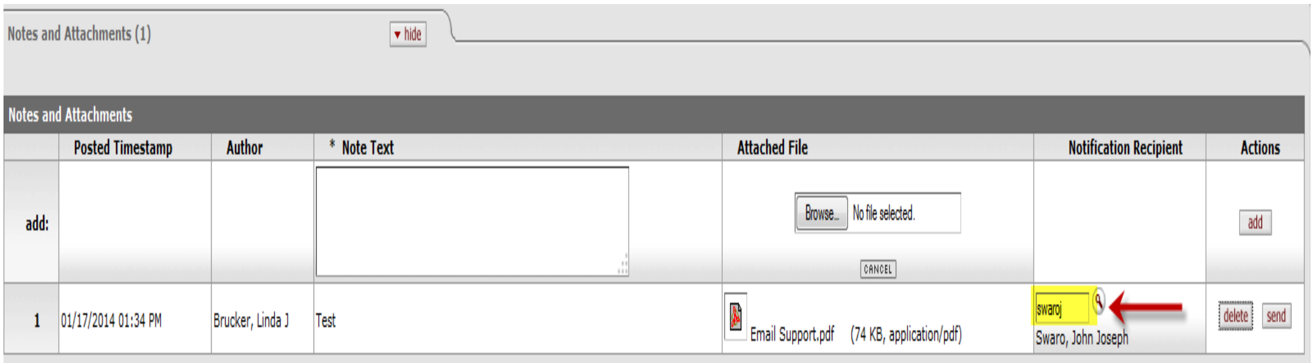
9. New Shop Catalogs landing page and enhancements.

- SciQuest has updated their site with their new Phoenix interface with enhancements.
    - New look – new Shop Catalogs landing page
    - New slide out menu for hosted catalog search and user options

10. Internet Explorer browser setting change.

- Compatibility view should be turned **off** to accommodate the new changes to KFS.
- When using KFS Shop Catalogs, compatibility view must be turned **off**.
- The current version of Firefox can be used as an alternative.

11. Notification Recipient box added to FP documents. This will send the document as an FYI to the user's action list.

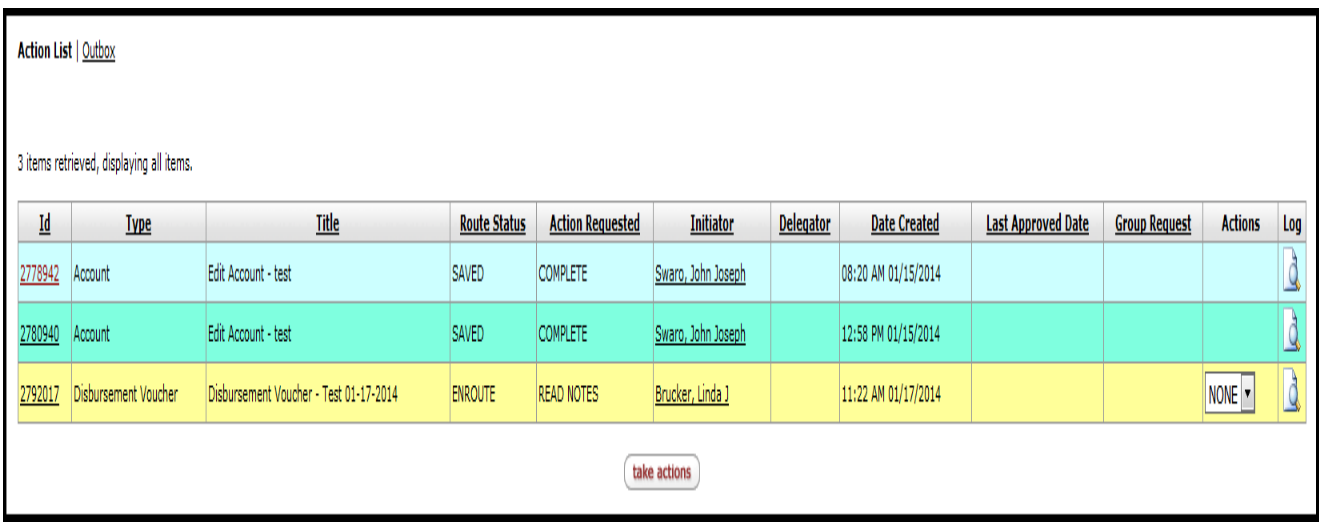


Notes and Attachments (1) ▾ hide

Notes and Attachments

	Posted Timestamp	Author	* Note Text	Attached File	Notification Recipient	Actions
add:				Browse... No file selected. CANCEL		add
1	01/17/2014 01:34 PM	Brucker, Linda J	Test	Email Support.pdf (74 KB, application/pdf)	swaroj Swaro, John Joseph	delete send

The document will appear in the action list under Action Requested as "Read Notes".



Action List | Outbox

3 items retrieved, displaying all items.

Id	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Last Approved Date	Group Request	Actions	Log
2778942	Account	Edit Account - test	SAVED	COMPLETE	Swaro, John Joseph		08:20 AM 01/15/2014				
2780940	Account	Edit Account - test	SAVED	COMPLETE	Swaro, John Joseph		12:58 PM 01/15/2014				
2792017	Disbursement Voucher	Disbursement Voucher - Test 01-17-2014	ENROUTE	READ NOTES	Brucker, Linda J		11:22 AM 01/17/2014			NONE	

take actions