

**KFS 5.03 Upgrade**

**February 2014**

**Enhancements**

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

The screenshot shows the 'Available Balances Lookup' form. It includes fields for Fiscal Year (2014), Chart Code (CO), Account Number, Sub-Account Number, Object Code, and Sub-Object Code. The 'Consolidation Option' section has three radio buttons: 'Consolidation' (selected), 'Detail', and 'Exclude Sub-Accounts' (highlighted in yellow with a red arrow pointing to it). Below this is the 'Include Pending Ledger Entry' section with radio buttons for 'No' (selected), 'Approved', and 'All'. At the bottom are 'search', 'clear', and 'cancel' buttons.

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

The screenshot shows the 'Open Encumbrance Lookup' form. It includes fields for Fiscal Year (2014), Chart Code (CO), Account Number, Sub-Account Number, Object Code, Sub-Object Code, Balance Type, Document Type, Origin Code, and Document Number. The 'Include Pending Ledger Entry' section has radio buttons for 'No' (selected), 'Approved', and 'All'. Below this is the 'Include Zeroed Out Encumbrances' section with radio buttons for 'Include' and 'Exclude' (highlighted in yellow with a red arrow pointing to it). At the bottom are 'search', 'clear', and 'cancel' buttons.

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

The screenshot shows the 'Distribution Of Income And Expense' application. The 'Accounting Lines' section is expanded, showing a table with columns for \* Chart, \* Account Number, Sub-Account, \* Object, Sub-Object, Project, and Org Ref Id. The 'From' section has a highlighted 'Line Description' field with a red arrow pointing to it. The 'To' section is also visible below.

From							
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id
add:	CO						
	Line Description						

To							
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id
add:	CO						
	Line Description						

### 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.

A dialog box with the title "Recall to Action List or Recall and Cancel document?". Below the title is a red asterisk followed by the text "Please enter the reason below:". Underneath is a large, empty text input field with a vertical scrollbar on the right. At the bottom of the dialog are two buttons: "recall to action list" and "recall and cancel".

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.

The screenshot shows a requisition form for 'Item 1' with a description of 'computer'. The 'Extended Cost' is 1,500.00. Below this is the 'Accounting Lines' section, which is currently collapsed. The 'Source' table has columns for Chart, Account Number, Sub-Account, Object, Sub-Object, Project, Org Ref Id, Percent, Amount, and Actions. The 'Percent' and 'Amount' columns are highlighted in yellow, and red arrows point to them from the 'Extended Cost' field above.

* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	Percent	Amount	Actions
CO							0.00		add

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

The screenshot shows a row of buttons at the bottom of the page. The buttons are: calculate, submit, save, blanket approve, close, and cancel. The 'calculate' button is highlighted in yellow.

## 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

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Notes and Attachments

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

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

Action List | [Outbox](#)

3 items retrieved, displaying all items.

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