# Access to Kuali Financial System (KFS)
# July, 2014

## User Access

- Users requesting access must complete an "Application for Kuali Financial System" form. http://busfin.colostate.edu/forms.aspx

  ***KFS Access*** allows the user to:
  - Create financial documents, shop catalogs, create/edit accounts, create/edit account delegates, create/edit vendor data.
  - Inquire on documents, balances, transactions, & maintenance table data.

  ***Internal Order Supplier*** allows the user to complete/fill internal order documents. Internal Order Suppliers are from departments that provide services to other campus departments. Access is limited to those departments that are pre-authorized to accept Internal Orders.

  ***Work Order Authorization (WOA) Supplier*** allows the user to accept WOA orders. WOA Suppliers are from those few departments that provide WOA services to other campus departments. Access is limited to those departments pre-authorized to accept WOA orders.

  ***KFS Capital Assets KFS-CAM Processor*** allows the user to initiate Capital Asset documents such as location changes, asset record edits, check out assets on loan and retire assets.

  ***Budget Construction Processor*** allows the user to create budgets during the annual Budgeting process. Access must be coordinated with the Office of Budgets. http://www.budgets.colostate.edu/financial-forms.aspx

- Users must have an eID (ename and password) and be a current/active employee.

- Associates may have access to the system, provided they have an eID and obtain authorization from their sponsoring department.

- Many components of the system are unavailable to the typical campus user. This would include Contract Manager Assignment, Payment Request, Vendor Credit Memo, Cash Management, Journal Voucher and Service Billing. If you do not have authorization to a component of the system and click on these links, you will receive an error message.

## Additional User Access

**Document value**

**<=$1,000.00**

Fiscal Officers may approve these documents. Typically, the Fiscal Officer is the first and only approver for these documents. An "Application for Kuali Financial System" application is required; in addition, the user must be listed on the applicable accounts as the Fiscal Officer.
http://busfin.colostate.edu/forms.aspx

**$1,000.01 to $9.999.99**

Fiscal Officers are the initial approver for these documents. In addition, another departmental user must approve these documents. Users approving at the departmental level must complete an "Application for Signature Authorization" form.
http://busfin.colostate.edu/forms.aspx

**>=$10,000.00**

Fiscal Officers are the initial approver for these documents. A second, departmental user is the next approver for these documents. In addition, a Dean/VP level user must approve these documents. Users approving at the Dean/VP level must complete an "Application for Signature Authorization" form.
http://busfin.colostate.edu/forms.aspx

**Authorized Business Function Documents**
**(Documents to Object codes 6626-6627, 6649-6651, 6749)**

Fulfillment of University objectives requires certain promotion and development activities, and their related expenses, to foster economic and civic responsibilities to students, employees, financial supporters, and communities. However it is critical to recognize their extreme sensitivity to the *perception* as an abuse or mis-use of public resources. Evaluation of all such activities and their costs at an appropriate management level must occur to ensure they are reasonable, normal and necessary, to verify the existence of a net primary benefit to the University, and to ensure conformance with all applicable rules and regulations (whether university, federal, state, sponsor, city, or other jurisdictions). Users approving Authorized Business Function documents must complete an "Application for Authorized Business Function Approvals" form.
http://busfin.colostate.edu/forms.aspx

**Operational Data Store (ODS)**

The Operational Data Store (ODS) is the data warehouse for campus reporting. It contains ARIES, Human Resources, FAMIS, RAMCT, legacy FRS financial and Kuali Financial System (KFS) data. Users needing access to the ODS must complete a Data Access Request by logging into the Campus Administrative Portal (CAP)/Campus Reporting/ODS and following the instructions on the ODS tab.

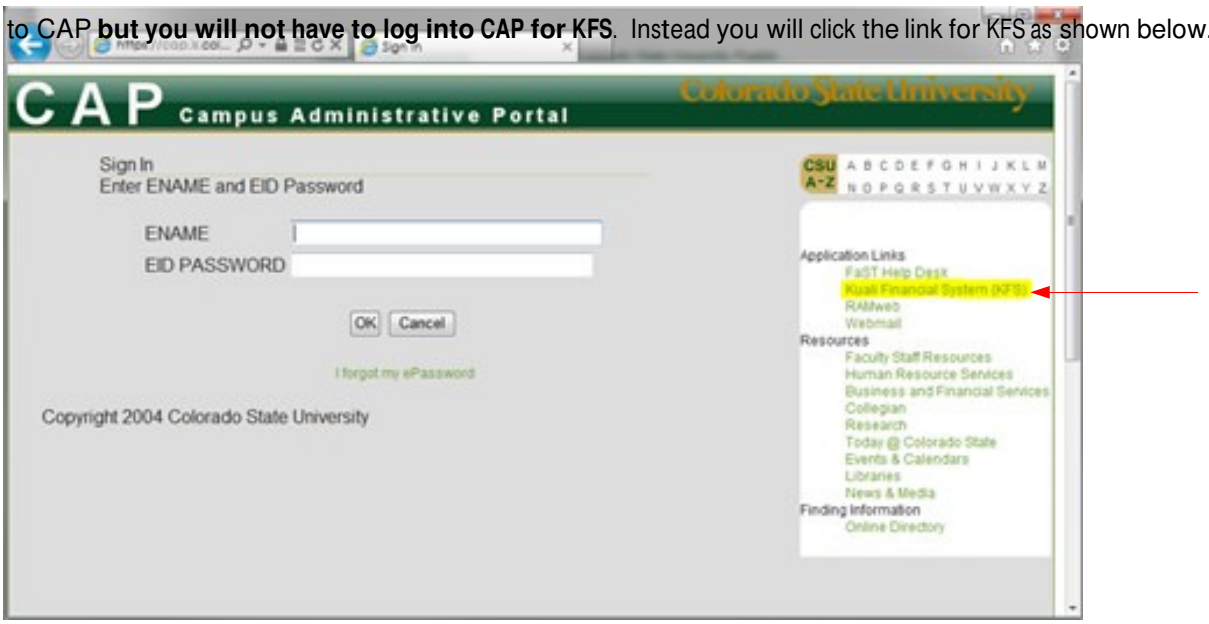
**Vista Plus Reports**

Vista Plus is an online report repository for storing and managing official University reports. Users needing to view Vista Plus reports must complete a "Vista Plus User Account Request" Form. http://busfin.colostate.edu/forms.aspx

# Login

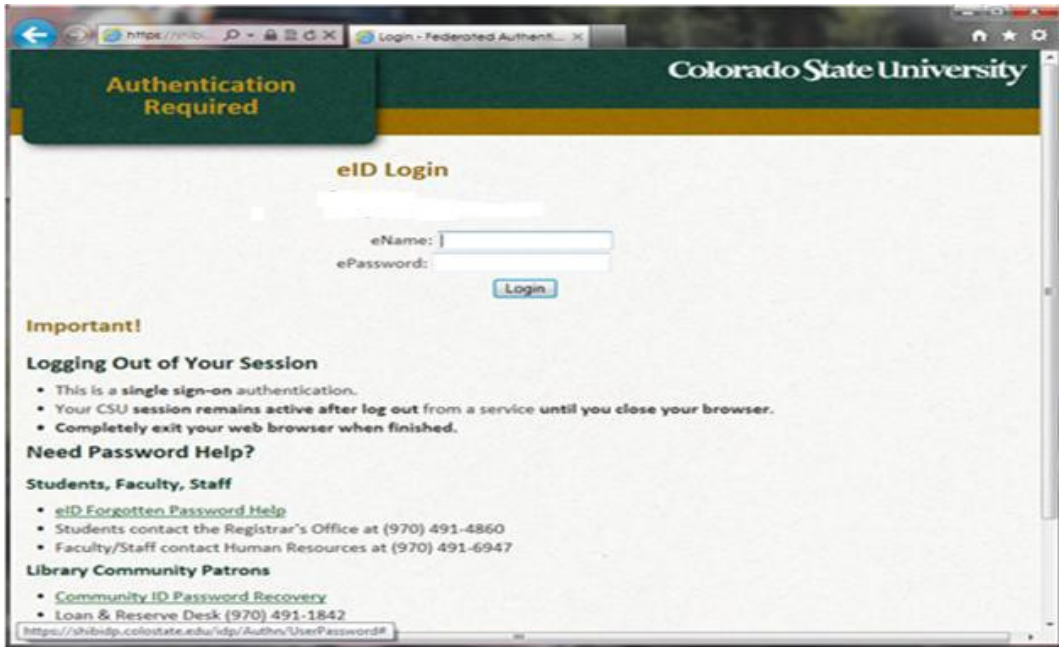
## Logging into the Kuali Financial System

Go to CAP **but you will not have to log into CAP for KFS**. Instead you will click the link for KFS as shown below.




When you click on "Kuali Financial System" you will be taken to a new screen where you will need to select your identity provider, see below. There are two to choose from, CSU and CSU-Pueblo. You should choose CSU by clicking on the CSU logo.

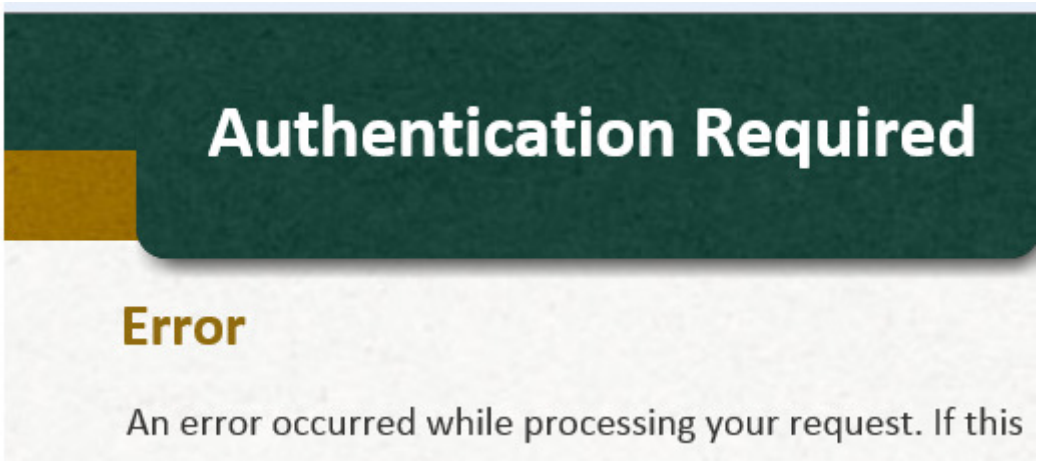
After selecting CSU you will be taken to the login page shown below. At this screen you should login in as you normally would with your EiD and password. From this screen you will be taken to KFS.




If you have logged into CAP first to access other systems you may go through the same process described above to access KFS without logging out of CAP. You will also be able to switch back and forth from KFS to CAP services without logging out of either. There is a link for KFS in CAP under the "Links (require additional sign-on)" heading. See below.

CAP Campus Administrative Portal
Colorado State University
HOME
CAMPUS REPORTING
RESEARCH
ETHORITY
ARIESWEB
LOGOUT
CAP Home
KFS Training
Welcome to the Campus Administrative Portal (CAP) web page.
CAP is designed as an entry page to the administrative applications supported by the Information Systems Department.
All available applications are accessed using the region on the right side of the page. The "Quick Applications" provide single sign-on access. The "Links" require a second sign-on using your current application username and password. The categories at the top of the page are to provide access to additional resources.
The "Help Request or Feedback" link can be used to communicate questions, suggestions or issues regarding the administrative applications supported by Information Systems in addition to any general Information Systems related questions, suggestions or issues. The Help Desk is monitored from 7:45 - 16:15 Mon-Fri.
Please use the "Help Request or Feedback" link to provide feedback regarding the CAP web pages. You can also send email to is_help_admin@mail.colostate.edu. We welcome your comments.
To access the CAP web page from off campus, please use the URL https://secure.colostate.edu and select the CAP menu item.
To create CAP as a Favorite (Bookmark) for access from on campus, use this page instead of the sign-on page. From off campus you should bookmark https://secure.colostate.edu
CSU A-Z
A B C D E F G H I J K L M
N O P Q R S T U V W X Y Z
Quick Applications for CMAC
Human Resources
ARIES (not ARIESweb)
Discoverer Plus
CAP FAQs
Help Request or Feedback
FAMIS Self-Service
Data Access Request
Time Clock
Links (require additional sign-on)
Applications Manager
Kuali Financial System (KFS)
Vista Plus
Vista Plus Help Desk
Non-production Applications
TRAINING Kuali Financial System (KFS)
ARIES TEST (not ARIESweb)
Resources
Faculty Staff Resources
Colorado State Homepage
Today @ Colorado State
General Applications
Change ODS Password
Help Desk Login
Outlook Web Access
Information
Search CSU
Online Directory
Equal Opportunity statement
Disclaimer statement
IT Security and Privacy
Privacy policy

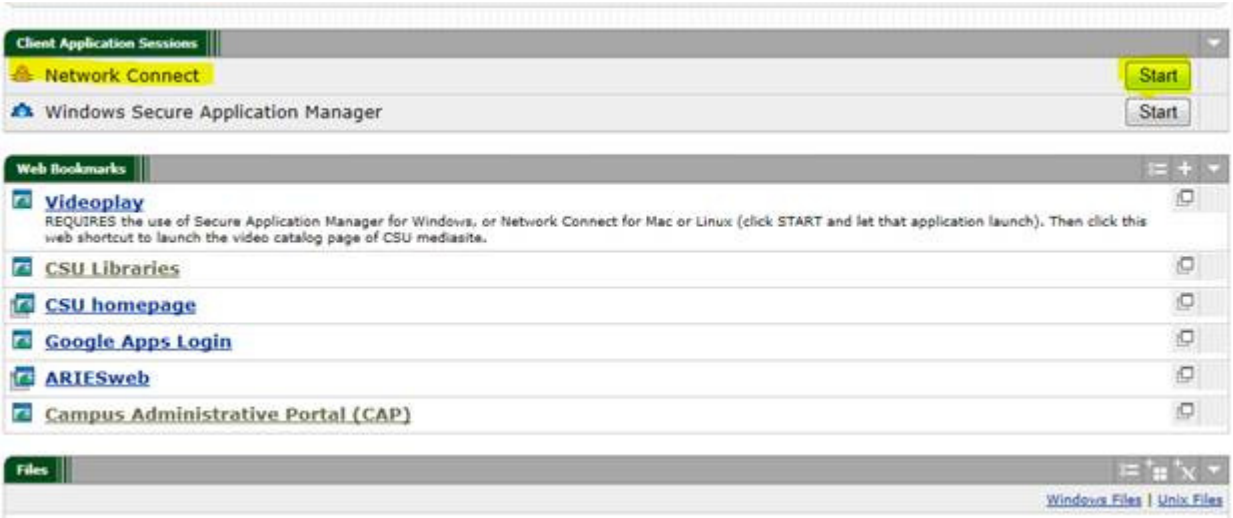
If you have timed out of a previous session, you may get an Authentication Required Error.




Go back to the CAP login page. Reselect the Kuali Financial System. A second login page will appear; this may open in a second window. Reselect your campus, and you will be directed to the Kuali Financial System.

## Login from Off Campus

- To login from off campus:
  - open a secure portal connection with your eID - https://secure.colostate.eduu
  - After logging into secure.colostate.edu
  - Choose: Click the Start button for Network Connect, noted below.
  - This will create a secure connection when you are working off campus.
  - Once the Network Connect is started (wait a few minutes)
  - Open a separate web browser and go to: http://cap.is.colostate.edu
  - Access Kuali from the CAP menu.



## Logout

- To logout, close the Kuali window and logout of the Campus Administrative Portal.

## Hours of Availability

- The system is unavailable for nightly processing from 7:00pm to approximately 10:00pm, Monday thru Friday.

  The system is available during the weekend & holidays, except when maintenance and system upgrades are conducted. This is usually Sunday mornings (not every Sunday morning), and is announced ahead of time via e-mail and posted to the message of the day (located near the top on the main menu tab in KFS).

## Browser

- The system supports Internet Explorer 9-11 or Mozilla Firefox. If using Internet Explorer, make sure that compatibility view is turned off.

- Safari and Opera may or may not work with all KFS screens.

- Mac Users need to use Firefox. We have heard of some problems with Firefox on Mac but other users have no problems. The only supported browser on Mac is Firefox and we will continue to work with those users who have problems.

- Depending on your screen resolution, you may need to use the scroll bars to navigate your document. If you create Requisitions, a resolution of 1280x1024 is suggested. This allows you to navigate the Requisition without the cross scroll bars.

- Shop Catalogs/Sciquest Users
  This URL should be added to your trusted sites:
  https://solutions.sciquest.com
  Go to: Tools, Internet Options, Security, Trusted Sites, Sites, add the above URL, Add, Close, OK (a system administrator may need to complete this task).

- Both Internet Explorer and Mozilla Firefox browser settings must allow 3rd party cookies for use of Shop Catalogs. Also, pop up blocker should be unchecked (a system administrator may need to complete this task).

## Contact

KFS Operations bfs_kfs_operations@mail.colostate.edu