**Guidelines to complete the User Registration document**

* **KFS navigation:** **Main Menu > User Registration > User Registration**
* Open a new User Registration document and **write down the Doc Nbr** in the document header of your document.

|  |  |  |
| --- | --- | --- |
|  | **Tab / Action** | **Fields to be completed** |
| 1 | Document Overview | * No need to fill in |
| 2 | User Registration | * Lookup the principal name (employee number) of the new user that must be registered by completing the employee number at the Principal Name and/or Surname on the Person Lookup document. * Click on search * Choose record that you want to use and return value – the principal name and name will be completed on the document * The Active From date will be completed automatically as the date when the user registration document is completed. * If the person is on a contract basis, the Active To date field must be completed otherwise it can be left blank. |
| 3 | Access to Chart of Accounts and Membership | * Type in the Organization(s) to which the person must have access to. * If the person must have access to certain specified roles, that roles must be mentioned in the Membership(s) field. |
| 4 | Ad Hoc Recipients:  Persons Requests | * Click on and choose APPROVE  * Complete or lookup the employee number of the person who must authorize the registration of the new user. * Click on the button to add that person to the document. |
| 5 | Ad Hoc Recipients:  Group Requests | * For Office Use Only |
| 6 | Submit | * Click on so that the document can route to the next person in the workflow. |
| 7 | Route Log | * To follow the progress and find out who is next in line to approve * Click in the Pending and Future Action Requests |
| 8 | Close | * Click on to close the document and on **YES** to save the document again. |