**Summary – Introduction to KFS and Management Approval**

1. **Login into KFS**

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| 1. | Type in your **Username** **= employee number** |
| 2. | Type in your **Novell Password** |
|  | Click on |

1. **The Action List**
   1. **Configuring the Action List**

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| 1. | Click on |
| 2. | The  button is in the middle of the Action List Tool bar. |
| 3. | Click on the  button. |
| 4. | Modify or add additions to your preferences. |
| 5. | Click the button to add changes to your preferences. |

* 1. **Acting on items in your Action List**

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| 1. | Click on |
| 2. | If there is items in your action list that needs your attention, that items will be listed |
| 3. | You may sort any column by clicking on the headings in the table that are underlined. |
| 4. | Click on the ID number of the document you wish to take action on. |
| 5. | Review document. |
| 6. | Click on the appropriate action button in order for your action to be recorded. |
| 7. | After you have taken Action on the document, that document will be removed from your Action List. |

1. **Document Search**
   1. **How to do a Document Search**

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| 1. | Click on the  button is located in the top left corner next to the Action List of all **KFS Screens** beginning with the **KFS Main Menu.** |
| 2. | Complete or lookup the document type **and/or** |
| 3. | Complete the employee number or lookup the name of the Initiator by filling in the Surname between asterisk (\*) on the person lookup screen and click on |
| 4. | Return the required value |
| 5. | The person details will now be in the document search field in the Initiator field and/or |
| 6. | Complete the Document number at the Document Id field if known by you and/or |
| 7. | Complete or lookup the date that the document was create |
| 8. | Click on the  button |
| 9. | The document(s) will return according to the search data that were provided. |
| 10. | Click on the specific **Document Id** to open the document |

* 1. **How to do a Detailed Document Search**

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| 1. | Click on the  button |
| 2. | Extra search fields will open |
| 3. | Complete or lookup the information as known to you – you can only complete one of the fields if preferred |
| 4. | **Please note:** The **Date Created From** will default as today’s date – change it if you are searching for a document created on another date. |
| 5. | For this example, the Title field will be completed |
| 6. | If you know a piece of the description field of the document that you want to search for, complete that piece of information between asterisk (\*) for example \*test\* |
| 7. | All documents that contain that piece of information, will return |
| 8. | Click on the specific **Document Id** to open the document |

1. **Adding and Viewing of Notes and Attachments**
   1. **Adding of Notes and Attachments**

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| 1. | Choose document on your Action List or do a Document Search |
| 2. | Open the document |
| 3. | Scroll down till you reach the Notes and Attachments tab / collapse the tabs |
| 4. | Open the Notes and Attachments tab |
| 5. | There will be a Zero between brackets on the right of the Notes and Attachments tab |
| 6. | Enter a note and choose the file of the document that you want to attach |
| 7. | Click on the  button |
| 8. | The note and document will now be attached to the e-Doc with a timestamp and with the name of the person who have added the note and/or attachment. |
| 9. | There will now be a number on the right of the Notes and Attachments Tab |

* 1. **Viewing of Notes and Attachments**

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| 1. | Choose document on your Action List or do a Document Search |
| 2. | Open the document |
| 3. | Scroll down till you reach the Notes and Attachments tab / collapse the tabs |
| 4. | If there are notes and/or attachments on the document there will be a number on the right of the Notes and Attachments tab. |
| 5. | Open the Notes and Attachments tab by clicking on |
| 6. | Click on the  to open and download the attachment |
| 7. | Click on the file to open the attachment |
| 8. | The document will open according to the type of document |

1. **Create Ad Hoc Recipient**

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| 1. | Scroll down to the Ad Hoc Recipient tab in the document |
| 2. | Select the desired action for the Action Requested list. |
| 3. | Enter of lookup the employee number of the person who you want to add as Ad Hoc Recipient |
| 4. | Click on  to add the Ad Hoc Recipient to the Workflow. |
| 5. | Take the action on the document that was required from you for example |
| 6. | The Ad Hoc Recipient will form know part of the routing |

1. **Creating of an Organization Review Delegate**

**KFS navigation:** **Main Menu > Lookup & Maintenance > Chart of Accounts > Organization Review**

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| 1. | Click on the **Organization Review** option below the **Chart of Accounts** link. |
| 2. | Complete your principal name and other fields if needed. |
| 3. | Click on  to view Organization Review setups. |
| 4. | Choose setup for which delegate must be created |
| 5. | Click on **create delegation** |
| 6. | Type in a meaningful reference in the **Description** field for example principal number of the delegate with the document acronym that he will be the delegate of. |
| 7. | The fields will already be completed with the Organization/Accounting Reviewer info. |
| 8. | Choose the Delegation Type Code: Primary – workflow will go directly to the delegate. Secondary – delegate must choose person on his/her Action List. It is preferred that a Secondary delegate is used so that that delegate must choose the name of the person of whom he/she are the delegate of from his/her action list. |
| 9. | Complete or lookup the principal name of the person who is being created as delegate |
| 10. | Complete the Action From Date and the Action To Date. The Action From Date will be defaulted as today’s date |
| 11. | Type in a note and/or add an attachment if needed |
| 12. | Complete or lookup a principal name if you want to add an Ad Hoc Recipient |
| 13. | Click on the  button to add that person to the document. |
| 14. | Click on so that the document can route to that person if applicable. |

1. **Action list of Delegate**

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| 1. | When a document is processed for which the Organization/Accounting Reviewer Delegate is the secondary delegate, an extra field will become visible in his/her Action List known as **Choose Secondary Delegation** |
| 2. | The Organization/Accounting Reviewer Delegate can then choose to name of the Organization/Accounting Reviewer for which he/she is the delegate to see the transactions in his/her Action List. |
| 3. | If the delegate was processed as a Primary delegate, the document will go directly to the action list of the delegator. |

1. **Deactivate a Delegate**

**KFS navigation:** **Main Menu > Lookup & Maintenance > Chart of Accounts > Organization Review**

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| --- | --- |
| 1. | Lookup delegate with the use of the Organization Review document |
| 2. | Complete Organization Code and/or Principal Name to limit the search to specific information |
| 3. | Choose **Yes** at the Delegate field |
| 4. | Click on  to view delegates that were set up. |
| 5. | Choose delegate that you want to deactivate |
| 6. | Click on edit of that specific delegate |
| 7. | Complete the description field with a meaningful description for example; deactivates principal ID and Account Number. |
| 8. | Complete or change Active To date on the delegate |
| 9. | Click on  so that the change can occur. |
| 10. | The delegate will no longer be active from the date as specified. |