

Financial Processing

User Registration in KFS

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| Document Summary |
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| Lesson Objectives |
|  |  On completion of this lesson you should be able to:  * Know the KFS registration procedure for a new KFS user.
* Have access to the KFS-system.
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| Lesson Scenario |
|  |  * As an existing staff member of the NWU you are required to work through this lesson, make some notes if necessary and print out the documentation as a guideline.
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| Lesson Prerequisites |
|  | * You need to be a NWU staff member that is registered on KFS as a user.
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## Process Flow



## User Registration



Figure 1

|  |  |
| --- | --- |
| 1. | Click on the **User Registration** option below the **User Registration** link.  |

## User Registration document



Figure 2

* This screen opens up the **User Registration** document. The tabs of this document in the example are set to **collapse all** to make the discussion easier.

## Document Overview tab



Figure 3

|  |  |
| --- | --- |
| 1. | Click on Show to expand the Document Overview tab.  |
| 2. | It is not necessary to fill in this Document Overview tab; this is only a preview of how the screen will look.  |
| 3. | Click on Hide to collapse the Document Overview tab again.  |

1. **User Registration tab**



Figure 4

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| 1. | Click on Showto expand the **User Registration** tab.  |
| 2. | This screen explains the **User Information** that must be provided to register a new user.  |
| 3. | Click onto **Lookup** the principal name of the new user that must be registered by completing his/her employee number in the Principal Name field or by completing his/her surname in the Surname field. |



Figure 5

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| 4. | Click on  to return results |



Figure 6

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| 5. | Choose item that you want to use and click on return value  |



Figure 7

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| --- | --- |
| 6. | The employee number and name of the new user will be completed in the Principal Name and Name field |
| 7. | The **Active From date** will be completed automatically as the date when the user registration document is completed. |
| 8. | If the person is on a contract basis, the **Active To date** field must be completed otherwise it can be left blank. |
| 9. | Click on  and then on Hide to collapse the **User Registration** tab again.  |

1. **Access to Chart of Accounts and Membership tab**



Figure 8

|  |  |
| --- | --- |
| 1. | Click on Show to expand the **Access to Chart of Accounts and Membership** tab.  |
| 2. | Type in the **Organization(s)** to which the person must have access to.  |
| 3. | If the person must have access to certain specified roles, that roles must be mentioned in the **Membership(s)** field. |
| 4. | Click on Hide to collapse the **Access to Chart of Accounts and Membership** tab again. |

1. **Ad Hoc Recipients tab**



Figure 9

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| 1. | Click on Show to expand the **Ad Hoc Recipients** tab.  |
| 2. | **Complete** or **lookup** the employee number of the person who must authorize the registration of the new user.  |
| 3. | That staff member could be the **Director/Head** of the department. |
| 4. | Click on the  button to add that person to the document. If an additional person must authorize the registration of the new user, another person can be added. |



Figure 10

* The adding of an **Ad Hoc Recipients: Person Requests** is a required field – if no person is added, the document will return with an error indication that an Ad Hoc Recipient must be added.

**Please note:** The **Ad Hoc Group Requests** field is for office use only.

* **Approve**: The document is waiting for your action. Review the e-Doc for accuracy and appropriateness. If errors exist, you will need to disapprove the document.
* **FYI**: The document continues routing without any action on your part. Document can be removed directly from your Action List without opening.
* **Complete**: You need to complete your saved document before you can initiate the document. The complete action request usually goes with the “Saved” route status.
* **Acknowledge**: The document continues routing without any action on your part. Document can be removed directly from your Action List without opening.





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| 1. | Click on  so that the document can route to the next person in the workflow.  |
| 2. | Click on Hide to collapse the **Ad Hoc Recipients** tab again.  |

## Route Log tab



Figure 11

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| --- | --- |
| 1. | Click on Show to expand the **Route Log** tab.  |
| 2. | This is only a preview of how the **Route Log** screen will look on the user registration document in KFS.  |
| 3. | You can therefore see which persons must approve the document as well as where the document is stuck in the process.  |
| 4. | The **Actions Taken** tab displays the history of workflow actions on the e-doc.  |
| 5. | The **Pending Action Requests** tab displays the next action to be taken and shows more detailed routing information about this request.  |
| 6. | The **Future Action Requests** tab shows the action requests that Workflow will generate in the future based on the information currently on the document.  |



* **SAVED**: The document has been started but not completed or routed. You can save your work, close the document, and retrieve it from you Action List for completion and routing at a later time.
* **FINAL**: The document is fully approved.
* **ENROUTE**: Approval requests on the Document are pending.
* **PROCESSED**: The document has no pending approval requests but still waiting for acknowledgement.



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| 1. | Click on Close to close the document and on **YES** to save the document again.  |

## The Action list of the approver





Figure 12

* The **Director/Head** of the department will receive the user registration document in his/her **Action List** for approval. After the **Director/Head** of the department have approved it, the System Administrator will receive the document in his/her Action list for approval and further completion.

## Document Search



Figure 13

* The initiator can check the status of the registration by doing a **Document Search**.

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| --- | --- |
| 1. | Click on  to search for a new KFS user.  |

## Detailed Search option



Figure 14

## The Title option



Figure 15

* Fill in the employee number of the new user between asterisk (**\***) at the **Title** field.



Figure 16

**PLEASE NOTE**:

* If the person’s document is still in **SAVED** status, the user is not registered, yet.
* The person’s document status must be in a **FINAL** status to be a registered KFS-User.

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| **Lesson Summary** |
|  |  Having completed this lesson you should be able to:* Know the KFS registration procedure for a new KFS user.
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