

## What is KFS Access?

Kuali Financial System (KFS) controls access to documents and workflow via Kuali Identity Management which consists of users, permissions, responsibilities and roles. Users, permissions and responsibilities are assigned to roles. To gain access to KFS, a user must be an active employee with a valid EID through university processes. This document explains the typical roles, groups and permissions of what access is granted to users. It is important to evaluate what types of access an employee needs for the system. Each year, Business and Financial Services will complete an audit of active users by contacting Business Officers to make sure access is correct and accurate.

Information regarding applications and proper procedures can be found under the Forms Section at [http://busfin.colostate.edu/Depts/KFS\\_Info.aspx](http://busfin.colostate.edu/Depts/KFS_Info.aspx)

### 1. General Access Active Faculty or Staff (Role 32)

A role that uses the Affiliation Type and Employee Status on a Principal record to determine if a user is an active faculty or staff employee. These users can initiate some KFS-PURAP documents and inquire into certain KFS screens. This access is considered a non-accounting role and is given to every active employee.

- No Form is Required
- Active status for an employee will be fed from HR systems and will apply this role automatically.
- An Inactive status on employee is done through HR Feeds to KFS from HR systems.
- The access includes.
  - Can use shop catalogs.
  - Can create requisitions.
  - Can approve TEM documents as the traveler.
  - Can take FYI action on PCard documents.
  - Can do balance inquiries on accounts (**NEW**)
- The access does not include.
  - Cannot create Disbursement Vouchers.
  - Cannot edit or create accounts.
  - Cannot create accounting entries using any of the Financial Processing documents (DI, TF, GLT, AV, AD, CR, PE).
  - Cannot be an Ad hoc person for additional review.

## 2. Standard Accounting Access (Role 54)

- **Form is Required.** [Application for KFS Instructions – Kual Financial System](#)

**Role 54** - The role that grants users access to KFS for accounting purposes only. It gives users the ability to initiate most accounting documents. Users are qualified by namespace, chart, and organization. The user's home department from the HR person feed must be the same as the completed form.

**Internal Order** – Group that allows users to process Internal Orders and assign revenue accounts to orders submitted to their Internal Order group. Not applicable to CSU-P campus as there is not an Internal Order process. Click [Internal Order](#) for more information.

**KFS Capital Assets/CAM Processor**- Group that allows user to oversee capital assets for the department under the guidance of Property Accounting in Business and Financial Services. Property Accounting must approve this access. Click the link for more information.

<http://busfin.colostate.edu/Depts/PropMgt.aspx>

- **Signatures are Required**- All required regardless of the access requested.

Applicant- Attestation of the following verbiage

I understand that the data contained in KFS is confidential. The access I am requesting is for my use in performing my job duties & responsibilities. I agree that my username & password will not be shared, and I am responsible for any accesses logged against my username. In using my username & password, I will follow the policies & procedures of the University. I will not use another person's username and password. If I terminate employment with the University or my department, I will notify Business and Financial Services.

Director/Department Head- Approval for Access at the department level

VP, Dean, or Business Officer- Approval for Access at a division level

Business and Financial Services- Approval of form signatures and input to KFS person record.

- If Employee moves departments the access is removed. Users will reapply under the newly approved primary assignment in the new department. New signatures are required.
- **TEM- The TEM arranger access and permissions will now be incorporated into the Standard Accounting Access (Role54). This gives users access to create TEM profiles and create travel documents (authorizations and reimbursements) for others on their behalf. This access will allow users to complete travel documents in departments outside of their qualified department and not requiring additional access. (NEW)**

- The access includes.

- All of Role 32 access as stated above.
- Can create Disbursement Vouchers
- Can edit or create accounts.
- **Can create and edit TEM profiles.**
- **Can create Travel Authorizations (TA) and Travel Reimbursement (TR) documents.**
- Can create accounting entries using most of the Financial Processing documents (DI,TF,GLT,AV,AD,CR,PE).
- Can be a Fiscal Officer
- Can be an Ad hoc person for additional review on documents.

### 3. Application for Signature Authorization (ORG & DIV approvals)

**High Level Approving Authority.** This is an operation role/group which has responsibility for ensuring that funds are spent and managed according to the goals, objective and mission of the organization, to ensure that the funds are being spent according to a budgeted plan and that the allocation of expenditures is appropriate to the function identified for the account. Applicant is considered a higher fiduciary reviewer than a Fiscal Officer. Provides oversight at the Organization and Division level. This role is denoted in KFS as ORG-department number or DIV-department number).

- Org Approvers are typically Department Heads or Directors. Provides fiscal oversight at the department level. Org Approvers are typically Account Managers.
- Division Approver are typically Business Officers, Deans, and Vice Presidents. Provides fiscal oversight at the Division level. (College and Vice President)
- Reviews and Approves documents that are enroute for larger transactions at the ORG and DIV group level. User oversees approvals at >\$1,000 for the ORG and >\$10,000 for DIV. Reviews transactions approved by Fiscal Officers for correct accounting.
- Standard Accounting Access (Role 54) is required for this Group access
- **Form is Required.** [Application for Signature Authorization Instructions – Signature Authorization](#)
- **Signatures are Required-** All required regardless of the access requested.

**Applicant-** Attestation of the following verbiage

I request signature authorization authority and agree to comply with all policies and procedures regarding the expenditure of University funds. I agree that all approved expenditures will be for official University business purposes only, are reasonable and that the activity is appropriate to the account being charged. I understand that in the event of willful or negligent default of this privilege, the University shall take any recovery action deemed appropriate, that is permitted by law.

**Dean/Director/Department Head/Business Officer-** Approval for Access at the department level/division level. Attestation of the following verbiage

I request that the above-named individual, an employee of Colorado State University, be granted signature authority. I agree to provide appropriate oversight and monitoring of this individual's fiscal activities

**Business and Financial Services-** Approval of form signatures and input to KFS person record.

- If Employee moves departments the access is removed. Users will reapply under the newly approved primary assignment in the new department. New signatures are required.

#### 4. Application for Authorized Business Function

**High Level Approving Authority.** A Senior Administrator as defined in Financial Rule 1.5.2 or other individuals approved by the President's Office to serve as an authorized business function approver must review and approve all authorized business function activities and their related costs. To approve documents within the Kuali Financial System (KFS) the authorized business function approver requests access by completing the Application for Authorized Business Function Approval form . This role is denoted in KFS as HOSP-department number).

##### [2-1. Authorized Business Function](#)

- **Form is Required.** [Application for Authorized Business Function Approvals Instructions – Authorized Business Function Approvals Only](#)

**Applicant-** Attestation of the following verbiage

I have read [2-1. Authorized Business Function](#). I understand those policies and procedures, and I agree to comply with them. I agree that all approved expenditures will be for official University business purposes only, are reasonable and that the activity is appropriate to the account being charged. I understand that in the event of willful or negligent default of this privilege, the University shall take any recovery action deemed appropriate, that is permitted by law

**Director/Department Head-** Approval for Access at the department level. Attestation of the following verbiage

I request that the above-named individual, an employee of Colorado State University be granted Authorized Business Function authority. I agree to provide appropriate oversight and monitoring of this individual's fiscal activities.

**Dean or Vice President-** I grant the above-named applicant authority to approve expenditures.

**Chief of Staff, President's Office-** Required If applicant's position is below the Assistant or Associate VP, Assistant or Associate Dean

**Business and Financial Services-** Approval of form signatures by Executive Director and input to KFS person record.

## 5. Central Administrative Roles

Access could include but is not limited to Accounts Payable/Travel Processor, Cash Manager, and Service Billing Processor other central processes

- Roles and Groups that are not part of the general campus access
- Business and Financial Services Access
- Procurement Services Access
- Office of Sponsored Programs Access
- CSU specific workflow groups (EHS and LAR)
- **Form Required** –



CentralRolesGroup  
sApplication.pdf

- **Signatures are Required.** All required regardless of the access requested

**Applicant Name and Department-**

**Department Director-** Approval from CSU-Pueblo Controller

**CSU Fort Collins BFS Director/Controller-** - Approval of form signatures and input to KFS person record.

