

We are pleased to announce that the Kualo Financial System (KFS) production environment is live to enter fiscal year 2015 transactions at Colorado State University-Pueblo!

While it is a tremendous accomplishment to bring the KFS system online, much work remains to be accomplished in the coming months, including converting FY14 AIS balances to KFS, loading budgets, implementing capital assets, and completing our first Kualo fiscal year-end a year from now. Over the next two years, we will be re-engineering processes, updating policies, and procedures, and deploying more of the KFS functionality to campus users.

We recognize that it will take a period of adjustment for all of us to become familiar with the KFS financial system, processes, and tools. As we all get used to doing things in a new way, we encourage your feedback to ensure processes and resources are revised or refined to serve the needs of the campus community. Please know we are here to support you, and we will continue to send additional communications with important news and updates.

What is changing with the implementation of the KFS system

KFS is one of the systems supported by the Kualo Foundation, a consortium of colleges and universities. The Kualo modules are open and community-sourced Enterprise Resource Planning (ERP) systems and support a wide range of campus operations.

Our KFS suite of financial modules includes:

- General Ledger and Chart of Accounts
- Electronic Documents Workflow
- Purchasing/Accounts Payable
- Capital Asset Management
- Financial Reporting

What is NOT changing with the implementation of the KFS system

Some financial process and transactions using Administrative Information System (AIS) will continue as in the past, including:

- Payroll
- Student Employment
- Student Accounts Receivable
- Financial Aid Disbursement
- Student Records

***Please note that account numbers and object codes will change in both KFS and AIS systems effective July 1, 2014. Account and object mappings are included on the website and in both systems.**

AIS, PAWS, and Employee Portal System Outage – July 1, 2014 12:01 a.m. to 5p.m.

The AIS, PAWS, and Employee Portal systems will be unavailable Tuesday, July 1, 2014 to run conversion processes related to the Kualo Financial System (KFS) implementation.

Kualo Website

The [Kualo Financial System \(KFS\) web page](#) is located on the [Business Financial Services](#) link and will be a primary resource for information and support with KFS. In addition to accessing the KFS application, the

KFS pages will include important announcements, training schedules, reference materials, tips of the day, and Frequently Asked Questions.

Training

Many of you already have attended a basic training session. We will continue to schedule new user training sessions in the coming months. Please check the [Training](#) page for sessions scheduled in July, August, and September 2014. We will develop other training sessions on the use of object codes, reports, and eDoc transactions soon.

User Access

All users must attend basic training to gain access to the KFS system. After attending a training session, complete a CSU-Pueblo [Computing Resource Application \(CRA\)](#) to request access to the system. A CRA also should be used to change existing access or delete a user's access.

System Availability

KFS production is available throughout the business day until 7 p.m. The system is unavailable from 7 p.m. until midnight for nightly cycle processing.

Notifications will be posted on the KFS website or sent to the user community if the system is unavailable during normal operating hours.

System Login

It is recommended to use a Windows 7 operating system with a Firefox browser, if possible.

You can access the KFS website directly, using the following instructions:

1. Enter <https://secure.colostate.edu/Pueblo> in your web browser to connect to the website.
2. Enter your CSU-Pueblo network eAccount Name and Password; select the "Login" command
3. Select the [KFS Production](#) link
4. Select the [Colorado State University Pueblo](#) link in the lower right corner of the "Choose Your Campus" page.
5. Enter your CSU-Pueblo network eAccount Name and Password again; select the "Login" command

Alternatively, you can access the website through the Faculty/Staff Portal , or the KFS Website, and follow steps 2 through 5 above.

You may access the system remotely from home, or anywhere you can access the internet, using the same instructions.

Feedback or Questions

Please report system issues with KFS via the Provide Feedback link in the upper right hand corner of the KFS application menu. Please include the document number, details about what you were doing when the problem occurred, and screenshots of relevant information. This will help system administrators keep track of issues, make enhancements, and correct problems as efficiently as possible.

Please direct navigation, chart of account, or "how to" KFS questions to your accounting or purchasing representatives.

- Accounting: [Lisa Ramos](#), X2356
- Purchasing: [Geraldine Trujillo-Martinez](#), X2054

Questions will arise in the coming months, and we will answer those as quickly as possible. Check out our FAQ page for answers to common questions. Submit a question by selecting the “[Have a Kuali Question?](#)” command then send an email to have your question and answer published.

Important Reminders

- Workflow and the Action List: KFS uses a robust workflow process to route transactions for approval. Transactions are not processed until all approvals for each transaction have been completed. Please check your Action List on a regular basis to ensure all pending transactions are processed in a timely manner.
- Route Log: If you do not see transactions posted to your accounts, please review the Route Log for any pending actions that may still be required.
- Levels of Approval:
 - Ad Hoc: Not required, except where noted below (*)
 - Fiscal Officer: Every transaction
 - ORG (Organization) Approver:
Transactions less than \$1,000: adjustment vouchers, budget adjustments, distribution of income and expense, general error corrections, encumbrances, and transfer of funds
Transactions \$1,000 and greater: same as <\$1,000 AND disbursement vouchers, internal billings and orders, and requisitions.
 - DIV (Division) Approver: Every transaction \$10,000 or greater and official functions
 - Specialty Approvals: Hazardous materials, controlled substances, animal research, separation of duties, etc.
- *Ad Hoc Approval: When creating transactions to spend funds from another department’s budget (i.e. central funds allocated), you are required to request ad hoc approval from the funding department. Documents that have not been approved by the funding department will be disapproved by the Fiscal Officer.