Reporting

Frequently Asked Questions

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Note. As KFS is still under development, this document will continue to be revised. This content reflects our understanding of the system at this time.
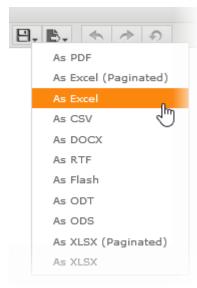
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Frequently Asked Questions

The following document reflects the most frequently asked questions about the KFS implementation. These questions will be updated on an ongoing basis.

1. **Can you download reports from KFS to Excel? What are the export/download options for reports?**

   A. Yes, reports can be saved and/or exported in Excel format (i.e. xls, xlsx, pdf). In the reporting menu, the Save As feature allows users to save reports in a variety of formats including Excel, PDF and others.

2. **If you enter a transaction today, will you see it immediately?**

   A. For most functionality within the system, KFS, like FRS, uses a nightly batch process to update the system. The reporting database will be refreshed each night and will reflect transactions processed through the prior day.

3. **Is it possible to run "delayed" reports so it doesn't "bog" down the system?**

   A. When the system goes live, we will not be able to run "delayed" reports. We will endeavor to add this functionality as a potential enhancement in a post-Go-Live update.

4. **Will we have access to more financial data than we currently have in FRSWeb?**

   A. For the initial KFS Go Live, we will replace the same level of data and access as currently exists in FRSWeb. We expect to add additional data and reporting functionality in Phase II updates.

5. **Can you pull reports for a calendar year instead of fiscal year? Can we cross fiscal years in a report (transaction/detail)?**

   A. Yes, for the transaction (ledger entry) report and download, you can specify the Start and End periods – you can run reports by calendar or fiscal year, and can cross fiscal years.

6. Will I be able to print reports for the duration of a sponsored project?
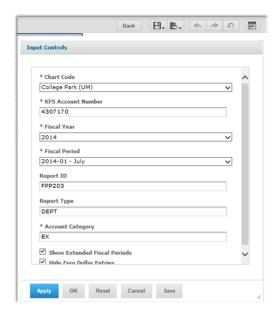
A. We are converting data for FY14, by accounting month, into KFS; historical data prior to FY14 is not being converted. You will be able to run reports specifying Starting and Ending periods; if the duration of a sponsored project is within FY14 (or beyond), you will be able to run a project report.

7. What data history will be converted?

A. All data for this fiscal year will be converted into KFS, by accounting period, from the beginning of the FY14 fiscal year (starting July 1, 2013). Prior year's historical data will continue to be accessed using the current systems (e.g. ELF, FRSWeb, Proweb).

8. Can we roll forward / backwards by period?

A. You will be able to change the fiscal period on the parameter screen (pop-up window) to view – see below screen:

Select period from the drop-down menu. Hit apply to view the period.

9. I have staff who are currently ELF users, but not FRS users, who access forms in ELF and/or reallocate/review PCard and TCard transactions. Will these forms become part of KFS?

A. The Purchasing Card Management System and Travel Card Management System will not move to KFS. Only some ELF Forms will move to KFS -- please see the ELF-KFS Crosswalk reference document for further information at http://kualifinancial.umd.edu/KFS/kfs-crosswalk-frs-elf.html

10. Will the Travel Approval Request (TAR) and Travel Expense Statement forms be available in KFS?

The Travel Approval Request (TAR) and Travel Expense Statement forms will remain in ELF and will function as they do now. Travel policies and procedures will remain the same.

11. **Will Financial and Procurement forms transfer over? Can you provide an ELF forms mapping to KFS so we can find our information?**

    A. Yes, please refer to the ELF-to-KFS Crosswalk for additional details at http://kualifinancial.umd.edu/KFS/kfs-crosswalk-frs-elf.html - this information will also be shared during training.

12. **What is the vision for Jasper reporting software – will the use of Jasper expand beyond KFS to other systems vs. the use of Hyperion and others for reporting.**

    A. The plan, at this time, is for Jasper reporting to only be utilized for KFS. In the future, we will study the possibility of expansion of Jasper reporting software to other campus-based systems.

13. **What will happen with BA3?**

    A. BA3 is being modified to accept and display KFS data. (Please contact Sharon Elliott for further information on the BA3 system.)

14. **Is the FPA091 the report that will replace FBM090?**

    A. No. FPA091 [Reporting Ledger Entries] will replace FBM091 [Report of Transactions]. A report similar to the printed FBM090 report will be available in KFS.

15. **Could we have additional selection fields like sub code for the year-to-date info?**

    A. For Go Live, additional selection fields will not be possible. We will consider this post Go Live for potential enhancement.

16. **Will the access levels be cumulative?**

    e.g. If you have access to Executive level reports, will you automatically be granted access to division reports and other lower level reports, or will access for each level of reporting need to be applied for and granted separately?

    A. Reporting is grouped by organizations. If you have access to a higher level in an organization, you will also have access to the sub-organizations beneath that level.