To our KFS user community:

We are pleased to announce that the University of Maryland’s new financial system, KFS – Kuali Financial System – is now live. Please take time to review this e-mail in its entirety as it contains important information for using the system and links to resources to assist you.

How to Access KFS
The KFS Website, hosted by the Office of the Comptroller, is the jumping off point to get you into the Kuali Financial application, including the financial reports that have been developed as part of our implementation. You can access the KFS website directly, using the instructions below. Alternatively, you can access the website through the ARES portal where you will continue to access FRS Web for historical reporting data along with other financial applications. As a reminder, you will need to be connected through VPN and use Mozilla Firefox as your web browser to access KFS.

- First, sign in to the University’s VPN System using the Cisco AnyConnect Secure Mobility Client application. Access the UMapps group using your university directory ID and password credentials.
- Next, using Mozilla Firefox as your web browser, access the KFS Website at http://KualiFinancial.umd.edu.
- The “Go to KFS” button on the KFS Website will take you directly to KFS’s main home page (or, if you only want to do financial reporting using KFS Web, use the “Go to KFS Web" button on the website). Click on the “Main Menu” tab near the top of the screen and you will be directed to the University’s Central Authentication Service (CAS) screen. You will be prompted to enter your Directory ID and Password to log in to KFS.
- Once logged in, you will be brought back to the KFS main home page. At the top right of your screen, you should see that you are “logged in” as your Directory ID user.
- Refer to any of the KFS UPK training courses on the KFS Website for a refresher on logging in to KFS.
- If you prefer to access the KFS website through the ARES menu, you must first sign in to the University’s VPN system and then use Mozilla Firefox to access the ARES menu. Clicking on the Kuali Financial System link will direct you to the KFS Website.

Many Ways to Get Help and Support
The KFS website, used for training registration, UPK training toolkits and other resources that helped prepare for the launch of KFS, will continue to be a primary portal for help and support with KFS.
In addition to accessing the KFS application, the KFS website provides access to a number of resources, including:

- **Important Announcements:** Especially during the first few days and weeks using the KFS system, important announcements about the system, including features, issues, downtimes and critical information will be updated daily and prominently displayed on our web page. If you are experiencing any issues, please check here first for important messages relevant to the KFS user community.

- **Training:** All KFS training materials are available as a refresher at any time. You can access the UPK training guides and all associated job aides 24x7 from your desktop using Mozilla Firefox as your web browser. Registration for live training courses will continue to be offered through the KFS website.

- **Reference:** A number of “crosswalks”, glossaries and reference materials to assist with the transition to the KFS system including the KFS Chart of Accounts, object codes and electronic forms (eDocs).

- **Tips of the Day, Communications and FAQ’s:** A repository of information to help you use the system’s features and functions and answer frequently asked questions will be available on our website. Important communications and other relevant information will be included.

- **Local Resources:** Information about your School/Department Unit Liaisons who can assist you with questions about training, security and support.

- **Learning Labs:** Beginning on Wednesday, January 8th, Comptroller’s Office project team members and subject matter experts will be available in our Learning Lab located at the Severn Building (in the same location where live user training took place). This is a great opportunity for you to receive hands-on assistance processing **Procurement, Accounts Payable and Financial Processing transactions** in KFS. Registration, through the KFS website, is required and space is limited. Users are expected to have already attended live training and be familiar with KFS functionality.

**Help Desk and Support Services**
The Office of the Comptroller has partnered with DivIT to provide telephone and e-mail help desk services. Please contact our KFS Helpdesk for any KFS-related questions or issues. The KFS Help Desk will respond to inquiries regarding: Accounts Payable; Purchasing; Vendor Management; Financial Processing; Account Set-Up; Capital Asset Management and Labor Distribution.

- You can log an incident or request a service by e-mailing us at **fp-kfs-support@umd.edu** at any time. This e-mail address routes directly to our incident management system and will be routed for prompt response by our KFS Support Team.
• You can contact the Service Center by phone: (301) 405-1500 Monday-Friday, 8:00 am – 6:00 pm

• Note: To ensure your requests can be tracked and monitored, and to provide you with the best possible service, all questions and requests for assistance must go through the KFS Help Desk. Please do not send e-mails requests for support services to kfs@umd.edu as this mailbox is not frequently monitored. Similarly, our project phone number, (301) 405-3020 is not monitored for KFS support. Also, Comptroller’s office staff will be monitoring calls and e-mails logged in to the KFS help desk and we ask that they not be contacted directly.

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 that all pending transactions are processed on a timely basis. Please refer to the training material if you need any refreshers reviewing transactions in your action list.

• If you do not see transactions posted to your accounts, please review the Route Log for any pending actions that may be required. Also, please check with the Fiscal Officer listed on your account if you have any questions about transaction routing within your School or department.

• The KFS system will send e-mails to users regarding transactions that require review and approval. Users may elect to customize the e-mail reminders through “preferences” within their action lists.

Receiving Function
• In order for some invoices to be processed against open Purchase Orders, a receiving transaction may need to be entered for the receipt of goods. Please refer to the training materials for a refresher on the eDoc for receiving if you have questions.

Saving your work and KFS Session Timeout
• To be compliant with University security guidelines, KFS will log users out of the application after a 15 minute period of inactivity. When you are entering transactions into KFS, it is good practice to save your work regularly so that, in the event of a system time out, you will not lose your information.

KFS System Availability
• KFS Production (transactional environment) will be available throughout the business day. Each night, at 7pm and continuing until about midnight, the system will be unavailable while we update the day’s transactions. Notifications will be posted on the KFS website or sent to the user community if we need to limit system access during normal operating times.

• KFS Web (reporting data warehouse) will be updated each night and be available as of 6am each day with all transactions processed through the previous day.

FY13 and FY14 Converted Data
• At go-live, all converted actuals data for FY14 will be available in KFS except for detailed Labor Distribution data. Converted data for FY14 includes:
  o General Ledger journal entry transactions and balances
  o Accounts payable and procurement transactions
  o Open Purchase orders
  o Capital Asset and inventory transactions and balances

• Labor distribution data will be available on Monday, January 13, 2014 for reporting and salary/benefit transaction processing.
  o All FY13 and FY14 payroll details will be available on January 13, 2014

• FRS Historical Data
  o All historical data will continue to be available, indefinitely, through FRS Web. This includes all financial processing, procurement, accounts payable, capital asset inquiries and reports and Statement of Payroll Charges downloads and reports through December 2013.

What is NOT Changing with the implementation of the KFS system
Many financial processes and transactions will continue to be processed as in the past, using ELF forms or other data collection and approval processes. Those processes that are not changing include:
  • Budget Amendments
  • P-Card processing
  • T-Card Processing
  • Travel Approval Requests (TAR)
  • Travel Expense Statements
  • Tuition Remission
  • Internal Service Requests (still in paper form)
We recognize that it will take a period of adjustment for all of us to become familiar with the KFS financial system and tools. Please know that we are here to support you, and we will continue to send additional communications as and when we have important news and/or updates to share. We are also dependent on your specific feedback so we can ensure that any system bugs are caught early, and that tools and resources are revised or refined as needed to serve your needs. To that end, please do not hesitate to contact the KFS Help Desk as noted above.

Paul Dworkis, John Farley, Colleen Dove and the entire KFS Project Team