

Kuali@USC

Kuali Basics

Reference and Training Guide

- Kuali Financial System
- Kuali Enterprise Workflow

Belongs to: _____

Version 20180904

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eDoc Fundamentals



In the Kuali system, which includes the Kuali Financial System (KFS) and Kuali Enterprise Workflow (KEW), department personnel initiate a transaction using a request form displayed in their Web browser. This transaction tool in Kuali is called a document or electronic document, more commonly abbreviated as an “eDoc.”

Anyone who initiates, reviews, or approves transactions in Kuali will interact with eDocs. The Kuali system automatically assigns a unique document number to each eDoc so that it can be tracked. Notes and attachments can be added to an eDoc by its initiator, or by a reviewer or an approver.

It is useful to remember that an eDoc is a request for an action to be recorded within the system. The eDoc generally must be reviewed and approved before the requested action takes effect, regardless of whether it is a financial transaction to be recorded in the General Ledger, the creation of a new entry in the Chart of Accounts, a course schedule change, or some other action.

The initiator of an eDoc receives immediate feedback on the validity of the document with respect to the appropriateness of data and compliance with USC business rules. Workflow rules are used to route a valid document to one or more designated approvers and/or reviewers based on the type and content of the transaction. See the following section, **About eDoc Routing**, for more on routing.

When an eDoc is routed to a Kuali user, it will arrive in that user’s Action List (see **Using the Action List** on page 22) with one of the following action requests: *Approve*, *Acknowledge*, or *FYI*. As implied by its name, the *Approve* request calls for a formal approval of the transaction, whereas *Acknowledge* and *FYI* are requests for two distinct kinds of acknowledgment. These action requests are described in more detail in **Commonly Requested Actions** on page 23.

NOTE: When viewing or editing information on a Kuali page, if you want to return to the page you were viewing previously, do not use your browser’s *Back* button (or a *Go Back* command) if other options are available at the bottom of the page. In some instances, using the *Back* button could result in an error requiring you to exit your browser and start over. Instead, if you want to leave a Kuali page, click either the  button to close the currently displayed page without saving any changes you have made there, or the  button to close a page on which you have made no changes. If those buttons are not available, you can use the *Back* function in your browser.

About eDoc Routing

Documents are routed by progressing through a series of route levels, also called “route nodes.” All eDocs support both predefined workflow routing and Ad Hoc routing. (See **What is Ad Hoc Routing?** on page 2 for more information.)

Kuali maintains a **Route Log** for all eDocs, which is a workflow feature that enables you to follow the progress of a given document through its review and approval process. (For more information about the Route Log, see **Route Log Tab** on page 53.)

The following table defines the various workflow routing status levels that an eDoc may have.

Table 1. eDoc Workflow Routing Status Levels

Route Status	Description
Initiated	The document has been started, but not yet saved or submitted. Closing an eDoc that has “Initiated” status has the same effect as canceling the eDoc.

Route Status	Description
Saved	The document has been created and saved within the system, but not yet submitted or routed. Saving an eDoc allows the initiator to preserve his or her data entries before closing the document, which can then be retrieved from the initiator's action list for completion and submittal at a later time.
Enroute	The document has been submitted and has pending <i>Approve</i> requests.
Processed	The document has been routed and has no <i>Approve</i> requests pending, but still has one or more pending <i>Acknowledge</i> requests. Documents with "Processed" status are considered approved, so they will update their destination in the system (e.g., General Ledger, Chart of Accounts, etc.).
Final	The document has been routed and has no <i>Approve</i> or <i>Acknowledge</i> requests pending. Documents with "Final" status are considered approved, so they will update their destination in the system (e.g., the General Ledger, Chart of Accounts, etc.). When a document has entered "Final" status, its details can no longer be edited, but the eDoc can be forwarded with an <i>FYI</i> action request to specific Kuali users or groups by means of Ad Hoc routing, with added notes or attachments in some instances.
Disapproved	The document has been disapproved by an approver. Once an eDoc has been disapproved, it will not continue to be routed to other users for approval, but an <i>Acknowledge</i> or <i>FYI</i> action request will be sent to the eDoc's prior approvers and its initiator.
Canceled	This status is applied when an initiator clicks the cancel button at the bottom of the page for an eDoc that he/she has not yet submitted, or for an eDoc that has been returned to him/her with a request to modify or cancel it. After the cancel button is clicked, the document is denoted as void and should be disregarded. Canceled eDocs cannot be modified in any way, and will not be routed to other users for approval. However, a document with "Canceled" status can be copied to create a new eDoc containing the same information, which the user can then modify as needed.
Exception	The document has been routed to an exception queue because workflow has encountered an error when trying to process its routing.

What is Ad Hoc Routing?

In the Kuali system, workflow routing is utilized to ensure that upon being submitted, each type of eDoc is forwarded to the appropriate individuals for review and approval in the proper sequence. Defining an eDoc's routing path to include specific individuals or groups is called "Ad Hoc routing."

The initiator of an eDoc can complete its **Ad Hoc Recipients** tab (see page 50) to customize the workflow route by adding specific individuals or groups in the Kuali system as reviewers or approvers. In addition, an individual who receives an eDoc for review or approval can likewise use the Ad Hoc Recipients tab to add other reviewers or approvers to the routing of that eDoc. When Ad Hoc routing is used to insert additional users into the workflow route as reviewers or approvers, it does not supersede the existing workflow routing of the document, but is used in addition to that routing.

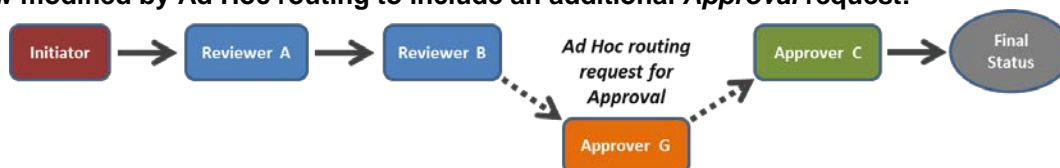
It is important to note that, in cases where the eDoc has pre-defined, automatic workflow routing, the insertion of additional Ad Hoc **approvers** into the routing will interrupt the regular routing process. For example, suppose that an eDoc's initiator, reviewer, or approver utilizes Ad Hoc routing to send an *Approve* request to another person in addition to the person designated as an approver in the normal automated workflow routing for eDocs of that type. The eDoc in question will be routed first to the Ad Hoc approver before being sent to the usual approver. Moreover, the eDoc cannot progress to "Final" status until all requested approvals have been obtained.

By way of illustration, suppose that an eDoc is designated to go to Kuali users **A** and **B** for review, and then to user **C** for approval. When reviewer **B** receives the eDoc, he can use Ad Hoc routing to also send it to user **G** for approval before it goes to regular approver **C**. In this scenario, reviewer **B** has interrupted the original route by inserting an additional approver (see the following diagrams).

Original workflow route:



Workflow modified by Ad Hoc routing to include an additional *Approval* request:



By contrast, Ad Hoc routing of non-approval review requests (either *Acknowledge* or *FYI*) will not interrupt the regular routing process. Financial processing eDocs for which these types of Ad Hoc requests are still pending will post to the General Ledger as soon as all *approvals* are obtained.

However, although the system does not put eDocs on hold while waiting for a response to an *FYI* or *Acknowledge* request, there is an important distinction between the two: If an eDoc is routed to someone with an *FYI* request, that eDoc will progress to "Final" status once it has received all needed approvals, regardless of whether the *FYI* request has been completed. By contrast, if an eDoc is routed to someone with an *Acknowledge* request, that eDoc cannot progress beyond "Processed" status if the acknowledgment has not been obtained, even if the eDoc has received all approvals. Therefore, it is usually preferable to send an *FYI* request and not an *Acknowledge* request.

Referring again to our previous example, suppose that when creating the eDoc, the initiator uses Ad Hoc routing to send it to user **M** with an *FYI* request. As illustrated below, the Ad Hoc routing request will not interrupt the original route; the eDoc will progress to "Final" status once the required approval has been obtained from user **C**, whether or not reviewer **M** has cleared the *FYI*.

Workflow modified by Ad Hoc routing to include an *FYI* request:



For additional information about *Approve*, *Acknowledge*, and *FYI* action requests, please refer to **Commonly Requested Actions** on page 23.

There are some eDocs (e.g., **Purchasing Documents Review** and **General Purpose Workflow**) that depend entirely on Ad Hoc routing; in other words, they do not have pre-defined, automatic workflow routing, and therefore the initiator must always define the route path. In those cases, any *Approve* requests added to the eDoc by other approvers are simply added to the end of the reviewer queue and thus do not interrupt the route path that was previously designated by others.

NOTE: Because most eDocs do have predetermined routing, and the use of Ad Hoc routing to add an approver can prevent an eDoc from moving into “Final” status, general advice regarding the proper action requests to select can vary from one type of eDoc to another. For recommendations specific to the type of eDoc that you are working with, please refer to the documentation pertaining to those kinds of Kuali transactions.

For instructions on how to add an Ad Hoc recipient, please see ***Completing the Ad Hoc Recipients Tab*** on page 51 of this guide.

Logging In and Out

Logging In to Kuali

To log in to the Kuali system, type www.usc.edu/kuali in the address field of your browser. When the “Kuali@USC” web page is displayed, click the **Kuali Login** link. (Alternatively, you can paste the following URL for KFS and KEW into your browser’s address field: <https://kfs.usc.edu/kfs-prd>.)

The USCnet sign-in page will be displayed (see following example).

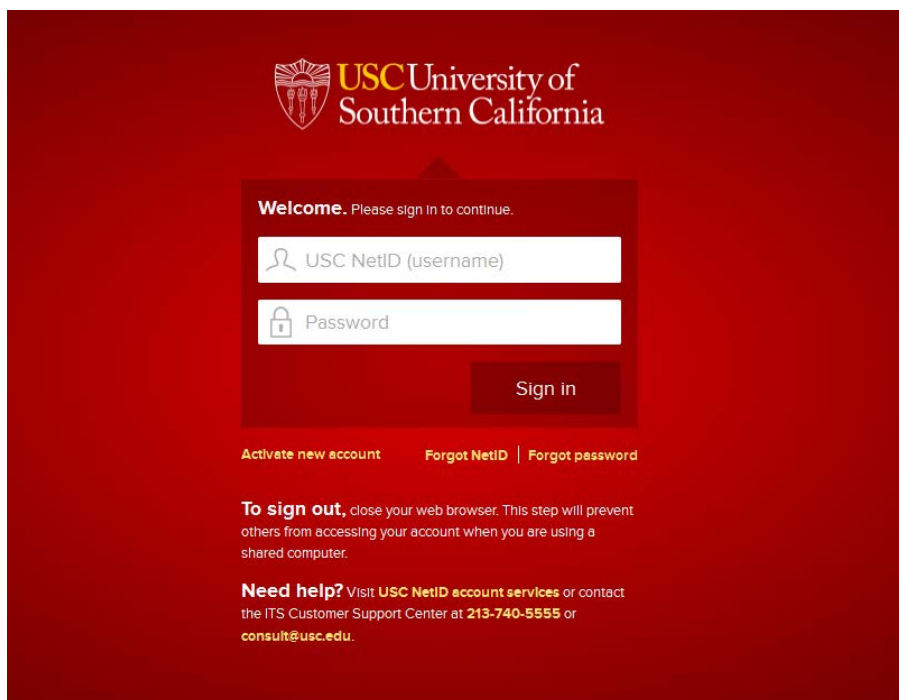


Figure 1 – USCnet sign-in screen

Enter your USC NetID user name and password, and click the **Sign in** button. Your USC NetID is the first part of your original, official USC e-mail address; the part preceding the “@” symbol. For example, if your USC email address was “*ttrojan@usc.edu*”, then ***ttrojan*** would be your USC NetID. Note that if you have changed your email address since you began working at the university, then your USC NetID would still be based on the email address that was originally assigned to you. If you do not know your USC NetID or password, call ITS Customer Support at 213-740-5555.

After you have entered your credentials and clicked the **Sign in** button, your browser will display a screen asking you to confirm your identity using *Duo Two-Factor Authentication*, which is required for USC staff when accessing most protected systems and on-line services at USC. (For information on using Duo two-factor authentication, refer to this web page: <https://itservices.usc.edu/duo/>) The user authentication process first verifies your credentials, and then opens a Kuali window configured specifically for your assigned role(s) and permissions.

TIP: If your browser is set to block pop-up windows from appearing, it is recommended that you modify those settings to allow or enable pop-ups from the Web address of the Kuali system.

If your login is successful, the Kuali window should immediately open in your browser, with the **Financial Main Menu** tab displayed, as shown in *Figure 2*.

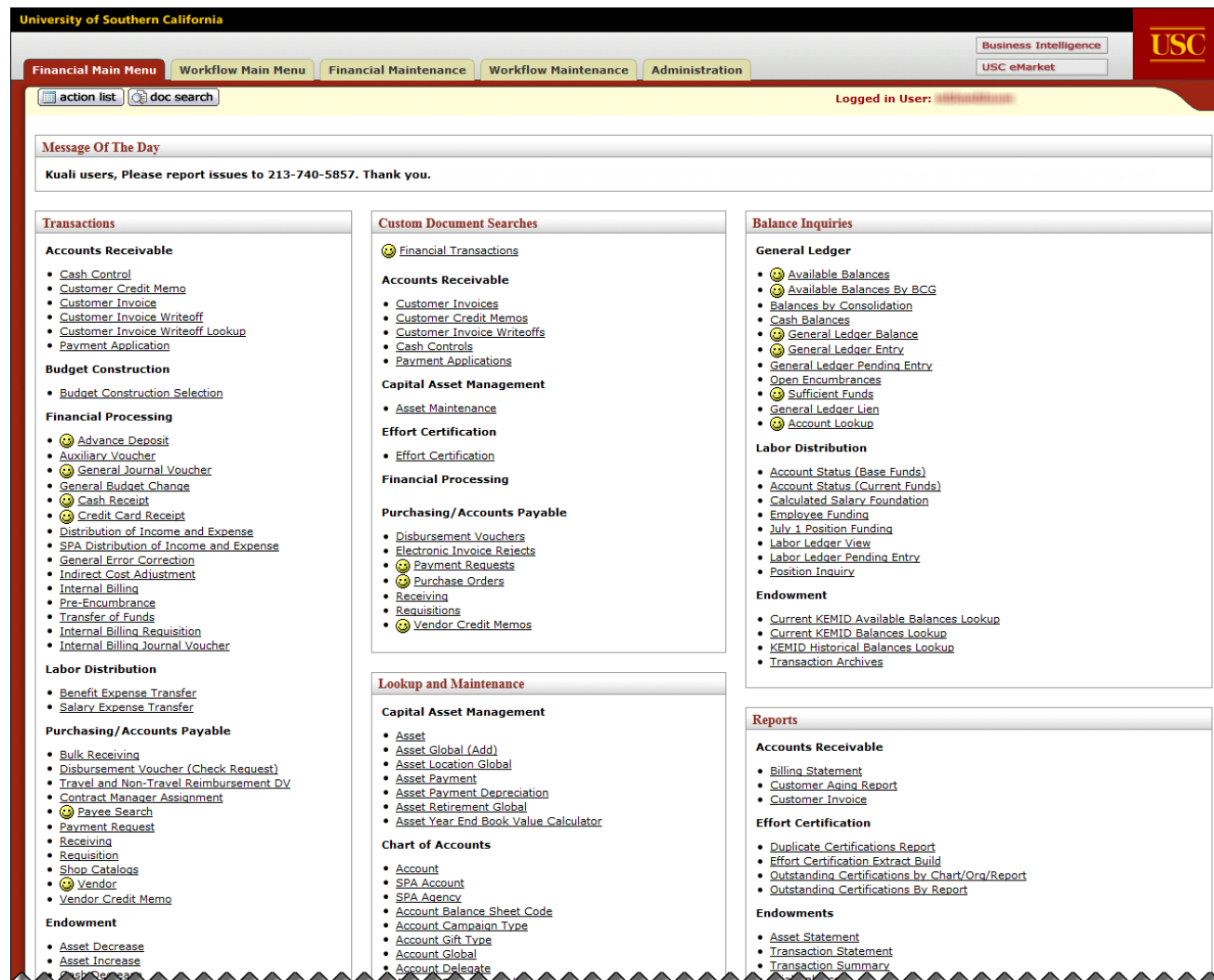



Figure 2 – Kuali Financial Main Menu

TIP: For convenience, it is recommended that you create a browser bookmark to the Financial Main Menu page for easy access to the Kuali system. When you later use that bookmark, you will be directed first to the “USCnet Login” page and then to the Financial Main Menu once you have logged in successfully.

Logging Out of Kuali

To log out of Kuali, you must close all of the open windows of your Web browser using the standard window **Close**  button. (On an Apple computer running the OS X operating system, you must also quit the browser.)

On-Screen Menus and Controls

Menu Tabs – The various functions available in the Kuali system are grouped into labeled sections on the menu tabs that you can select along the top of the screen. The **Financial Main Menu** and **Workflow Main Menu** tabs display groups of transactions and functions that regular users are permitted to initiate. The **Financial Maintenance**, **Workflow Maintenance**, and **Administration** menu tabs display groups of functions that can only be performed by administrative and technical staff, who are authorized to maintain the system tables that provide functionality in all of the Kuali applications.

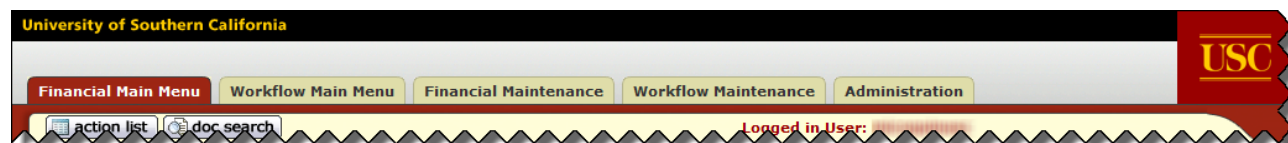



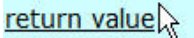
Figure 3 – Menu tabs along the top of the Kuali screen

NOTE: Not all of the options displayed on the various menu tabs are currently supported for use in USC’s implementation of the Kuali system. The “live” options are indicated by smiley-face 😊 icons. As more applications and functions are added, options on the menu tabs will be updated accordingly.

On-Screen Controls – Performing tasks in Kuali involves entering text, marking check-boxes, making choices using radio buttons, selecting from drop-down lists, clicking on action buttons, and using hyperlinks to navigate inside and outside the system. This section describes the on-screen elements used to perform these activities.

Table 2. Basic On-Screen Controls in Kuali

Element	Kuali Reference / Description
<input type="text"/>	Box (a/k/a edit box, text box, or entry field): A rectangular box in which you can type text. If the box already contains text, you can select that default text and delete it or replace it with new text. Use a keyboard to type text and numbers into the field, or you can paste in text and numbers that you have copied to the clipboard on your computer.
<input checked="" type="checkbox"/>	Check-box (a/k/a selection box): A square box that is selected or cleared to turn an option on or off. More than one check-box can be selected. Click within the box to place a check mark symbol to indicate the option is selected.
<input type="radio"/>	Option (a/k/a radio button, option button): A round button used to select one of a group of mutually exclusive options. Click within the circle that you want to select. The dot symbol indicates that the option is selected.
<input type="text"/>	List (a/k/a drop-down menu, combo box, or list box): A box with an arrow indicating a list that drops (expands) downward for viewing (may expand upward to take advantage of available screen real estate). Click the down arrow icon to list the available options, and then click the desired item in the list to highlight and select that option.

Element	Kuali Reference / Description
	<p>Button (a/k/a command button, action button): A rectangular button with a text label that indicates the action to be performed. Click the button to initiate the action.</p>
<p>http://www.kuali.org</p> 	<p>Links:</p> <p><i>External</i> (hyperlink to access an external file or Web page): Click on the underlined text (usually shown in blue) to open a file or navigate to a different Web page or system within the same Web browser (may open a new pop-up window).</p> <p><i>Internal</i> (hyperlink that enables you to navigate to a different place on the current page, a different screen within the current application, or a related system or function): Click on the underlined text to cause the desired information to appear.</p>

Screen Layout of an eDoc

The screen example shown in *Figure 4* identifies the various areas of an eDoc screen. An eDoc consists of a *document header* and a *document body*. The document header in the upper right corner of the screen displays system information about the document. Every document body is organized into sections that resemble a stack of folders with labeled tabs. Each eDoc displays tabs that are relevant to its function.

To expedite critical input, an initiated eDoc opens with required tabs open or “expanded,” and optional tabs closed or “collapsed.” An individual tab can be expanded or collapsed by clicking its **show** or **hide** button. (The label of the button changes depending on whether the tab is currently collapsed or expanded.) Action buttons appropriate to the logged-in user role are displayed at the bottom of the screen.

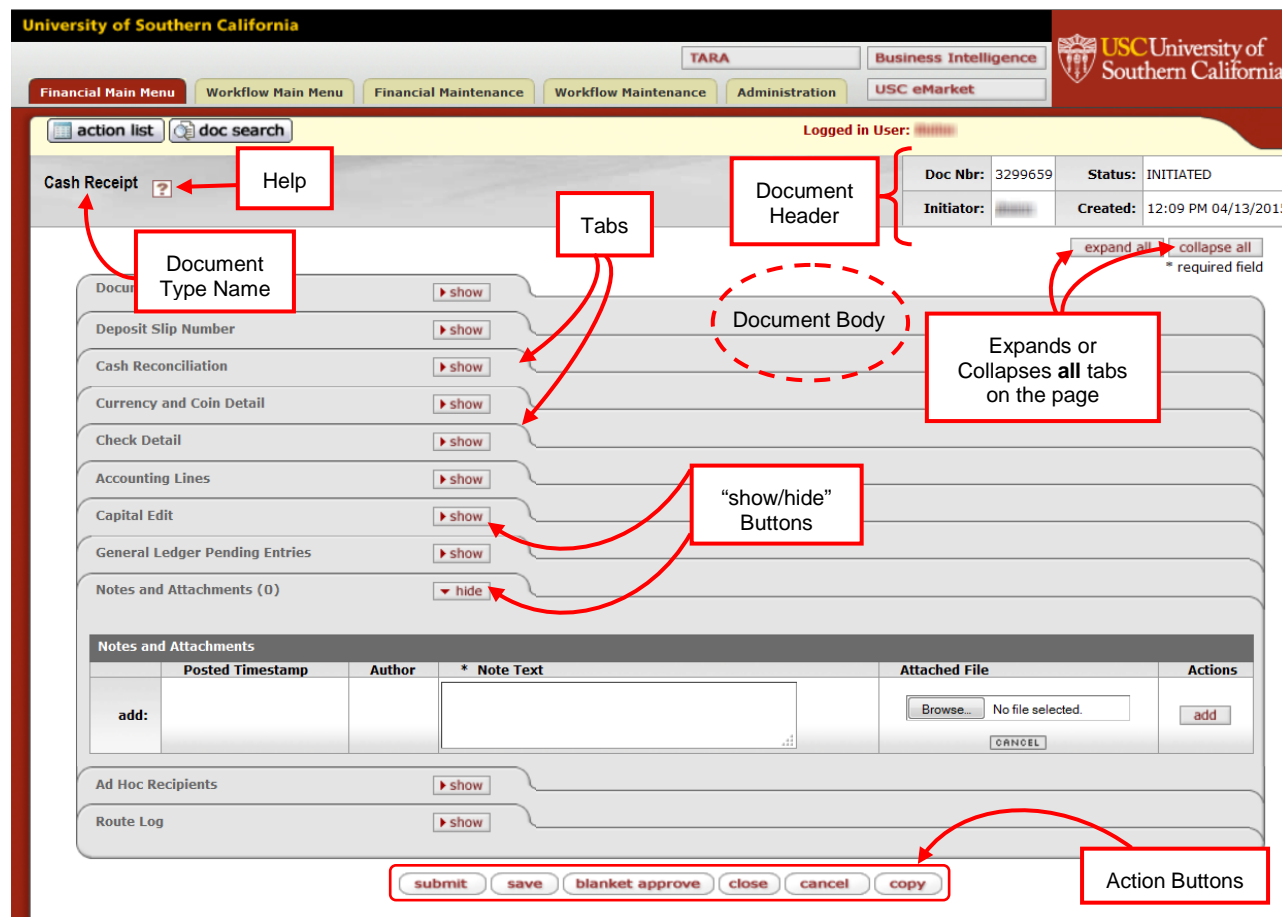


Figure 4 – Screen elements in an eDoc

NOTE: If you enter any information that requires the completion of another tab that is currently closed (i.e., collapsed), the eDoc page will be refreshed with that tab expanded for completion.


Document Header

Table 3. Basic Information in the eDoc Header

Field Name	Description
Document Number (Doc Nbr)	A unique auto-assigned number to identify each document. Kuali automatically assigns a number to each document when it is created. Numbering is sequential without regard to the document type.
Status	Identifies the workflow status of the document.
Initiator	The Kuali user name (also known as the “Kuali Principal Name”) of the document initiator.
Created	Time and date of document creation.

Expand All / Collapse All Buttons

You may expand or collapse all folder tabs on the currently displayed eDoc screen by clicking the **expand all** or **collapse all** buttons.

 Click **expand all** to expand all of the tabs in the currently displayed eDoc.

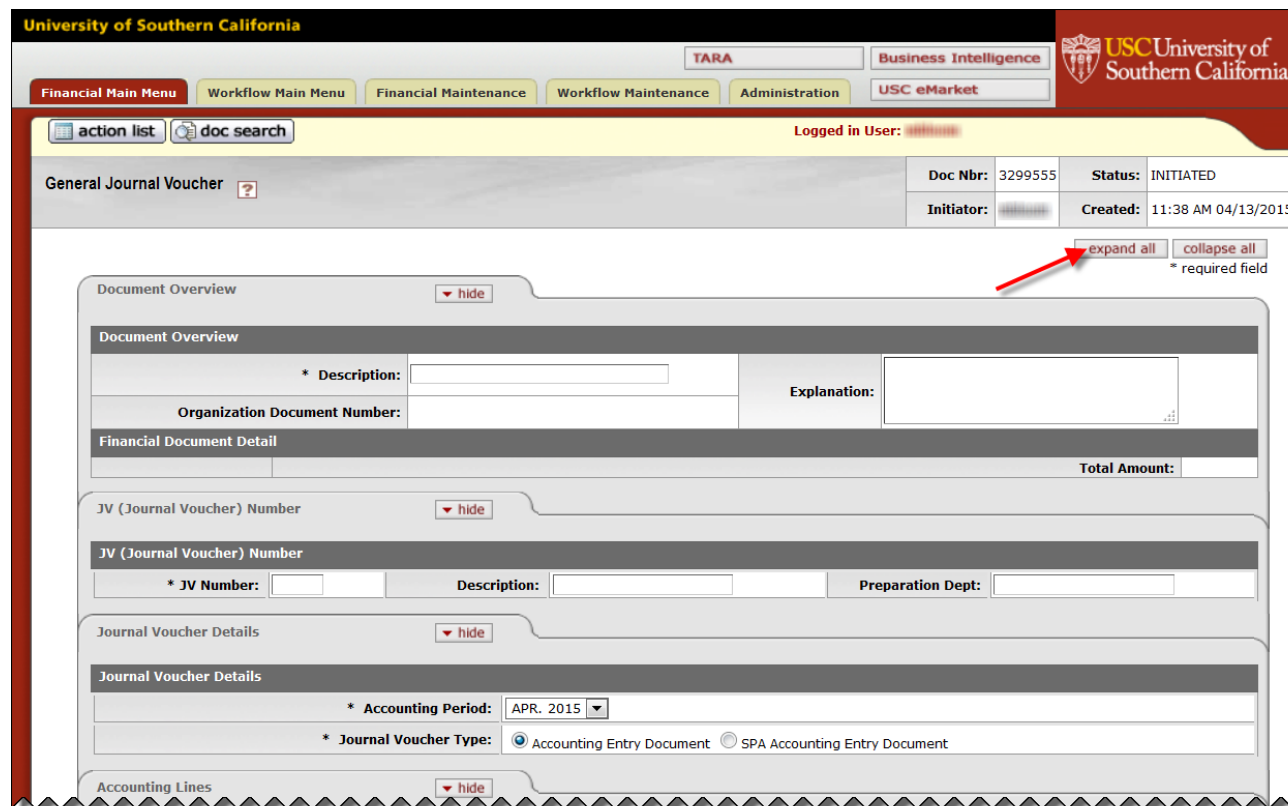


Figure 5 – Expanded eDoc tabs

Click **collapse all** to collapse all of the tabs in the currently displayed eDoc.

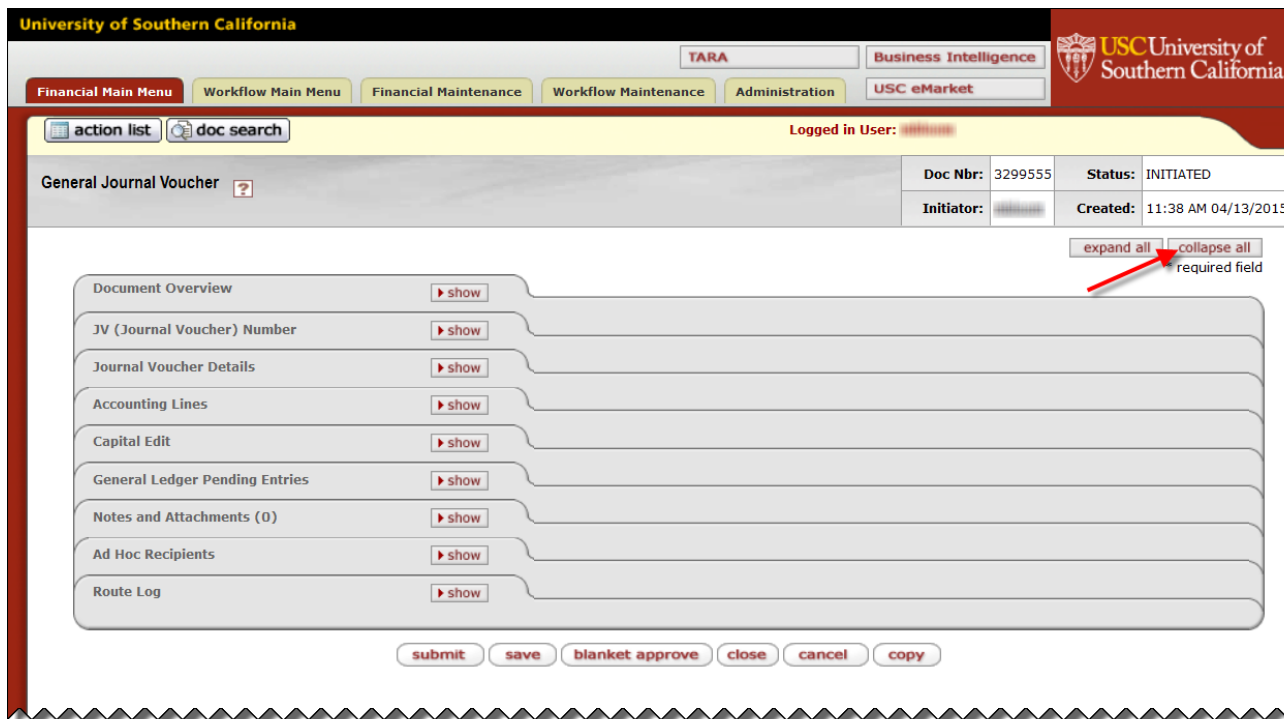


Figure 6 – Collapsed eDoc tabs

Show/Hide Buttons

/

Click the **show** or **hide** button on an individual tab to expand or collapse it. (The label of the button will change depending on whether the tab is currently collapsed or expanded.)

Required Fields

All required fields in an eDoc are identified with an asterisk. You cannot submit the eDoc until all required fields contain allowable data.

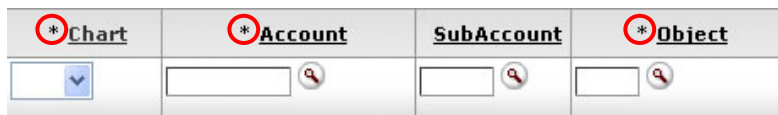



Figure 7 – Each required field is marked with an asterisk.

Date Fields

Dates must be specified in *mm/dd/yyyy* format. Alternatively, you may select a date by clicking the **Calendar**  icon and selecting a date from the pop-up calendar.

Be sure to select the correct month and year before selecting your entry.

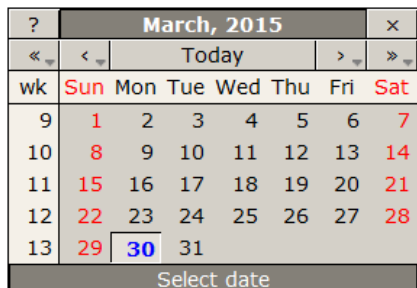


Figure 8 – Click the desired number to select a date from the calendar.

Action Buttons

Action buttons are displayed below the tabs on each page of your eDoc. Individual users will see only the action buttons that are allowed by their user profile and appropriate for the eDoc's current routing status. The following are examples of action buttons:



In response to clicking many of the action buttons at the bottom of the page, Kuali refreshes the screen and shows a confirmation message in the upper left portion of the eDoc screen. The precise outcome of clicking an action button on any eDoc is explained in the action steps for using that eDoc.

Examples:

- When you click **submit**, the confirmation message reads, "Document successfully submitted."
- When you click **reload**, the confirmation message reads, "Document successfully reloaded."
- When you click **save**, the confirmation message reads, "Document successfully saved."

Action Buttons that result in a Confirmation Prompt

- When you click **close**, Kuali will display a message asking you to confirm that you want to close the current eDoc. (Note that when you close an eDoc, any data that you have input will not be preserved unless you saved the document after entering data.)
- When you click **disapprove**, Kuali will display a message asking you to confirm that you want to disapprove the current eDoc. The confirmation prompt also requires you to enter a reason for the disapproval.
- When you click **cancel**, Kuali will display a message asking you to confirm that you want to cancel the eDoc. (Note that if you click yes, that eDoc's status will change to "Canceled.")

NOTE: Also see the section titled *Responding to an Action Request* on page 23.

Standard Links and Icons

Because Kuali is a web-based application, hyperlinks and icons are used for navigation. Clicking hyperlinks and icons enables you to “drill down” into document details in order to obtain additional information.

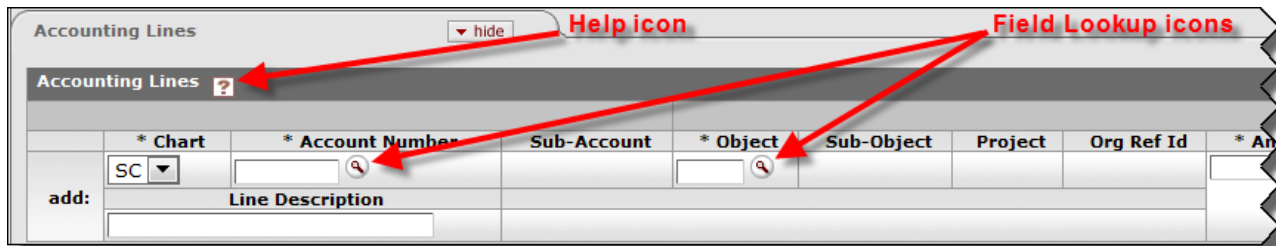



Figure 9 – Examples of icons

Help Icon

When you click the Help icon , the help screen displays information about the screen that you are viewing.

Field Lookup Icon



The round magnifying glass or “lookup” icon  enables you to look up reference table information for convenience and also to avoid data entry errors. After you click the lookup icon, the system displays a list of valid values for you to select from, or a lookup form that enables you to search for the value you need. (See the following example.) You can use wildcard characters in your search, as discussed in **Using Wildcard Characters When Searching** on page 18.

Figure 10 – Search form retrieved by clicking the Account lookup icon.

To look up valid values using this search form, follow these steps:

1. Fill in one or more search criteria, or leave all search criteria fields blank to retrieve all.
2. Click the  button.

Your search returns a list of values matching the search criteria. If you do not enter any search criteria, Kuali returns all values.

Note that some of the text in the search results is underlined. You can take action by clicking the hyperlink represented by the underlined item. (See *Figure 11*.)

Click **return value** to add the the line item value to your document field

Click **any other link** to view details in a new window or tab.

<u>Return Value</u>	<u>Chart Code</u>	<u>Account Number</u>	<u>Account Name</u>	<u>Organization Code</u>	<u>Account Type Code</u>	<u>Sub-Fund Group Code</u>	<u>Fiscal Officer Name</u>	<u>Closed?</u>	<u>Account Manager Name</u>	<u>Account Create Date</u>	<u>Account Expiration Date</u>
return value	SC	1000000083	CHANGE IN FUND BALANCE: CURRENT UNRESTRI	6120300000	NA	CU	Bloom, Marc	No	Bloom, Marc S	09/12/1983	
return value	SC	1001050001	Test Expired Account	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/23/2010	07/23/2010
return value	SC	1001050030	Test account education code 0030	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010
return value	SC	1001050060	Education Code 0060	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010
return value	SC	1001050090	Test Education Code 0090	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010
return value	SC	1001050150	Test Account Education Code 150	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010
return value	SC	1001050180	Test Education Code 0180	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010
return value	SC	1001050180	Test Education Code 0180	2040320000	NA	CU	Bloom, Marc	No	Hughes, Jerome	07/22/2010	10/01/2010

Figure 11 – Click return value to place search results in the document field you are working with. The other links display details for the items named in the column heading.

return value Click **return value** to select that search result for your document field.

Column Header Click the column header to sort your retrieved values by that column. Click once to sort in ascending order (A–Z or 0–9). Click a second time to reverse the sort and show values in descending order (Z–A or 9–0).

cancel Click the **cancel** button below the search criteria fields to cancel the search.

clear Click the **clear** button below the search criteria fields to refresh the page and clear all the fields in the search form so that you can specify new criteria.

Searching for Documents

Using Doc Search

The **doc search** button is located in the upper left-hand corner of the screen. Click this button to access the Document Lookup form, where you can enter criteria to search for an eDoc that you want to view or work with. *Table 4* describes the Basic Search criteria fields in the Document Lookup form. There is also a Detailed Search option available. For a comparison of the two types of document searches, see **Basic vs. Detailed Document Searches** on page 20.

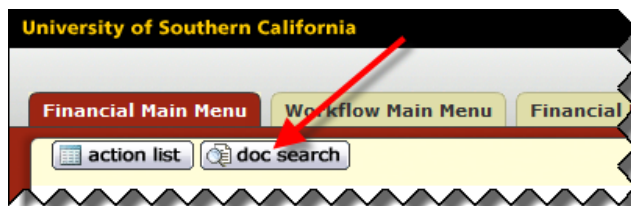





Table 4. Basic Search Criteria Fields in the Document Lookup Form

Field Name	Description
Type	Document type. Enter the document type or click  to select it from the Document Type lookup page.
Initiator	User ID of the document initiator. Enter the user ID or click  to select it from the Person lookup page.
Document/Notification ID	Enter the numeric document ID assigned by the system.
Date Created From/To	Enter or select from the Calendar  the range of document creation dates to search. You can select the From date only, the To date only, or both.
Name this search (optional)	To save the search criteria for future use, enter a name for the search. All saved searches can be accessed via a list at the top of the document search screen.

Use the following procedure when you want to search for an eDoc.


1. Click the  button. The Document Lookup form is displayed (see *Figure 12*).

The image shows a screenshot of the 'Document Lookup' form. At the top, there are tabs for 'detailed search', 'superuser search', and 'clear saved searches'. There is also a dropdown menu for 'Searches'. Below this, there are several input fields with labels and icons: 'Type:' with a lookup icon, 'Initiator:' with a lookup icon, 'Document/Notification Id:' with a question mark icon, 'Date Created From:' with a calendar icon, 'Date Created To:' with a calendar icon, and 'Name this search (optional):' with a question mark icon. At the bottom, there are three buttons: 'search', 'clear', and 'cancel'. A note '* required field' is visible in the top right corner.

Figure 12 – Basic Search criteria in the Document Lookup form

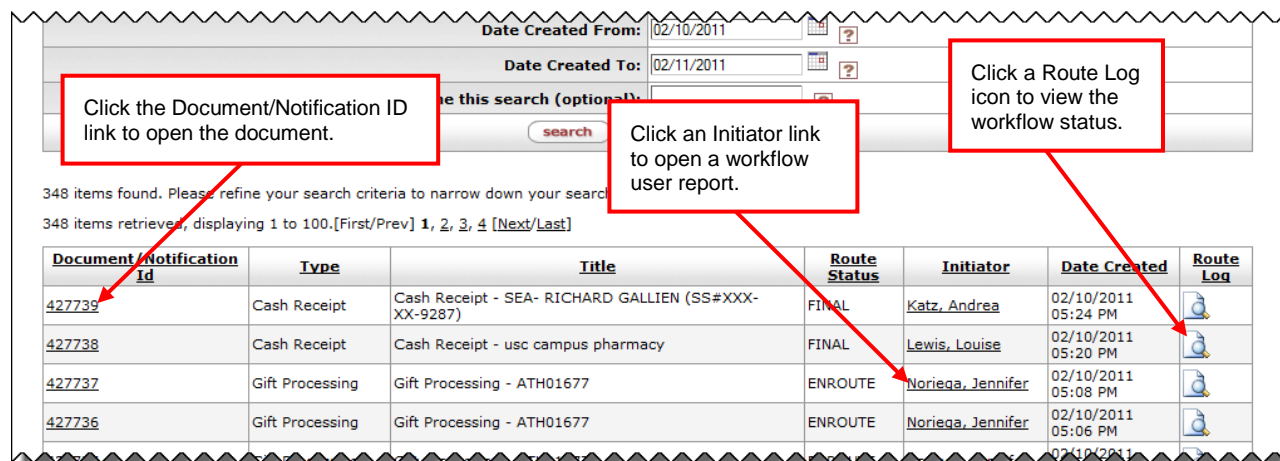
- If you want to search for a particular type of eDoc, you must enter the complete name of the desired document type in the **Type** field, without any wildcard characters. Note that for some eDocs, the complete name of the document type is an abbreviation, such as *CCR* or *PCDO*.

If you do not know the official name of the desired document type, you can use the following procedure to look it up:

- Click the  icon next to the **Type** field to access the Document Type Lookup form.
- When the Document Type Lookup form is displayed, enter partial names and wildcard characters in the Label field to search for the document type that you want, and click the **search** button. (For information on how to use wildcard characters, see **Using Wildcard Characters When Searching** on page 18.)
- When the lookup results are displayed at the bottom of the page, locate the desired document type and click its return value link.
- The Document Lookup page will be displayed again with the correct document type name now automatically entered in the **Type** field. Note that when the Document Lookup form reappears, it may be refreshed to include additional fields related to the document type you selected, or they may appear when you click elsewhere on the screen or press the TAB key to advance to the next field.

- Enter any other desired search criteria, and then click the **search** button at the bottom of the Document Lookup page.

The page will be refreshed to include the search results in a grid format at the bottom of the page, as shown in the example depicted in *Figure 13*. Any underlined entries in the results grid are hyperlinks that you can click to “drill down” and see relevant details.



348 items found. Please refine your search criteria to narrow down your search.
348 items retrieved, displaying 1 to 100. [First/Prev] 1, 2, 3, 4 [Next/Last]






<u>Document/Notification Id</u>	Type	Title	Route Status	Initiator	Date Created	Route Log
<u>427739</u>	Cash Receipt	Cash Receipt - SEA- RICHARD GALLIEN (SS#XXX-XX-9287)	FINAL	Katz, Andrea	02/10/2011 05:24 PM	
<u>427738</u>	Cash Receipt	Cash Receipt - usc campus pharmacy	FINAL	Lewis, Louise	02/10/2011 05:20 PM	
<u>427737</u>	Gift Processing	Gift Processing - ATH01677	ENROUTE	Noriega, Jennifer	02/10/2011 05:08 PM	
<u>427736</u>	Gift Processing	Gift Processing - ATH01677	ENROUTE	Noriega, Jennifer	02/10/2011 05:06 PM	

Figure 13 – Example of search results displayed on the Document Lookup page if no document type was specified.

Note that *Figure 13* (above) shows the results of a document search in which the **Type** field was left empty, meaning that no document type was specified. By contrast, when you have specified a particular document type as one of your search criteria, the columns presented in the grid of search results will vary according to which document type you entered in the **Type** field.

In all cases, the left-most column of the results grid will be labeled **Document/Notification ID**, and the eDoc ID numbers in that column will be underlined, indicating that they are hyperlinks. Click the eDoc ID link in any row of the grid to open that document. The right-most column will always be

labeled **Route Log**, and you can click the  icon in that column to view workflow information for the eDoc that appears in that row of the grid. (For additional information, see **Route Log Tab** on page 53, and **Using Document Search to Check the Current Status** of an eDoc on page 21.)

If the results grid for your document search includes an **Initiator** column like the one shown in *Figure 13*, you can click the name of an eDoc’s initiator to view contact information for that Kuali user.






Sorting the Results of a Document Search

The results of a document search are displayed in a grid format that is usually sorted in reverse chronological order, so that the most recently created eDoc is listed first. You can re-sort the results according to the contents of any of the columns by clicking the header of that column. Click the column header once to sort all the results in ascending order (A–Z or 0–9), and click the same header again to sort all the results in descending order (Z–A or 9–0).

Exporting the Results of a Document Search

Beneath the grid of search results (see *Figure 14*), you will see links at the bottom of the screen that you can click to export the results data in any of the following formats:

- **.CSV** (comma-separated values) file; a simple text-based format, in which each new line represents a database row, and the “fields” of data in that row are separated by commas; useful for importing and exporting data between databases.
- **spreadsheet** (an Excel .XLS worksheet)
- **.XML** (Extensible Markup Language); a format in which custom tags are used to define objects and their attributes; useful for programming or to make data transferable between applications.

457538	Course Scheduling	Course Scheduling - EDHP-587, 27005, 20112 Type:Addition	SAVED	Meiorado, Maria D	04/14/2011 11:17 AM	59	Summer	2011	27005	EDHP-587	Fieldwork in Higher, Adult and Professional Education	
457530	Course Scheduling	Course Scheduling - EDCO-575, 27620, 20113 Type:Change	FINAL	Meiorado, Maria D	04/14/2011 11:04 AM		Fall	2011	27620	EDCO-575	Field Work	
457409	Course Scheduling	Course Scheduling - IR-999, 99999, 20112 Type:Addition	ENROUTE	Mico-Quinn, Brian Andres	04/13/2011 04:35 PM	12314	Summer	2011	99999	IR-999	This is a test	
455274	Course Scheduling	Course Scheduling - 27555, EDUC-645a, 20113 Type:Change	CANCELED	Meiorado, Maria D	04/06/2011 06:05 PM		Fall	2011	27555	EDUC-645a		
454780	Course Scheduling	Course Scheduling - 27615, EDUC-514, 20113 Type:Change	FINAL	Meiorado, Maria D	04/05/2011 01:36 PM		Fall	2011	27615	EDUC-514		

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)

Figure 14 – Export options for Document Search results

Using Wildcard Characters When Searching

Wildcard characters (%) and (*) can be used when just a portion of your search criteria is known, such as the beginning letters of a name or the ending digits of an account number.


- Use the % wildcard to replace **any single letter or number** in a string of characters that you want to search for.
- Use the * wildcard to replace **a string of letters or words**. You can enter just the prefix, suffix, or root of a search term and replace the missing portion with an asterisk to find all forms of that word.

Example 1:

Type ***rich*** in the Initiator field to locate all documents for which the initiator's name includes the letter sequence *r-i-c-h*, regardless of how many characters precede or follow that string of letters. The search results will include all eDocs that match your other criteria and were initiated by individuals with user names such as *Richardson, Richfield, Prichard*, and so on.

Example 2:

If you type **1102*** in the Account number field, the search results will include all eDocs that match your other criteria and are associated with accounts that have account numbers starting with the numbers *1102*.

NOTE: Do not use wildcard characters in the **Type** field on the Document Lookup screen. If you want to specify a document type as part of your search criteria, you need to enter the complete name of the document type in question. If you do not know the name, you can click the  button next to the **Type** field to access the Document Type Lookup page, where you can enter partial names and wildcard characters in the Label field to search for the desired document type. When you locate the desired document type in the search results on the Document Type Lookup page, click its return value link, and the Document Lookup page will be displayed again with the correct document type name automatically entered in the **Type** field.

Custom Document Searches

Custom document searches enable you to search for specific types of eDocs based on attributes of the transactions, primary key data elements, or both. Additional fields, specific to different Kuali modules, are available in custom document searches. Some examples of custom document searches are customer invoices, Contracts and Grants proposals, and requisitions. Special access may be required to work with some of the eDocs found through custom document searches.

NOTE: Most of the Custom Document Search options pertain to items that are not currently processed through the university's Kuali system, such as invoices and payments. As the system is expanded to include additional processes, more of these Custom Document Search options will become available for use. The "live" search options are indicated by a smiley-face 😊 icon.

When you choose one of the search options listed in the **Custom Document Searches** section of the Financial Main Menu tab (see *Figure 15*), the system will display a Document Lookup form that contains a few added fields and other changes to accommodate the type of search you selected. When the results of your search are displayed, your assigned user role determines whether you have view-only permission to the listed documents or access rights that allow you to make changes or take other actions.

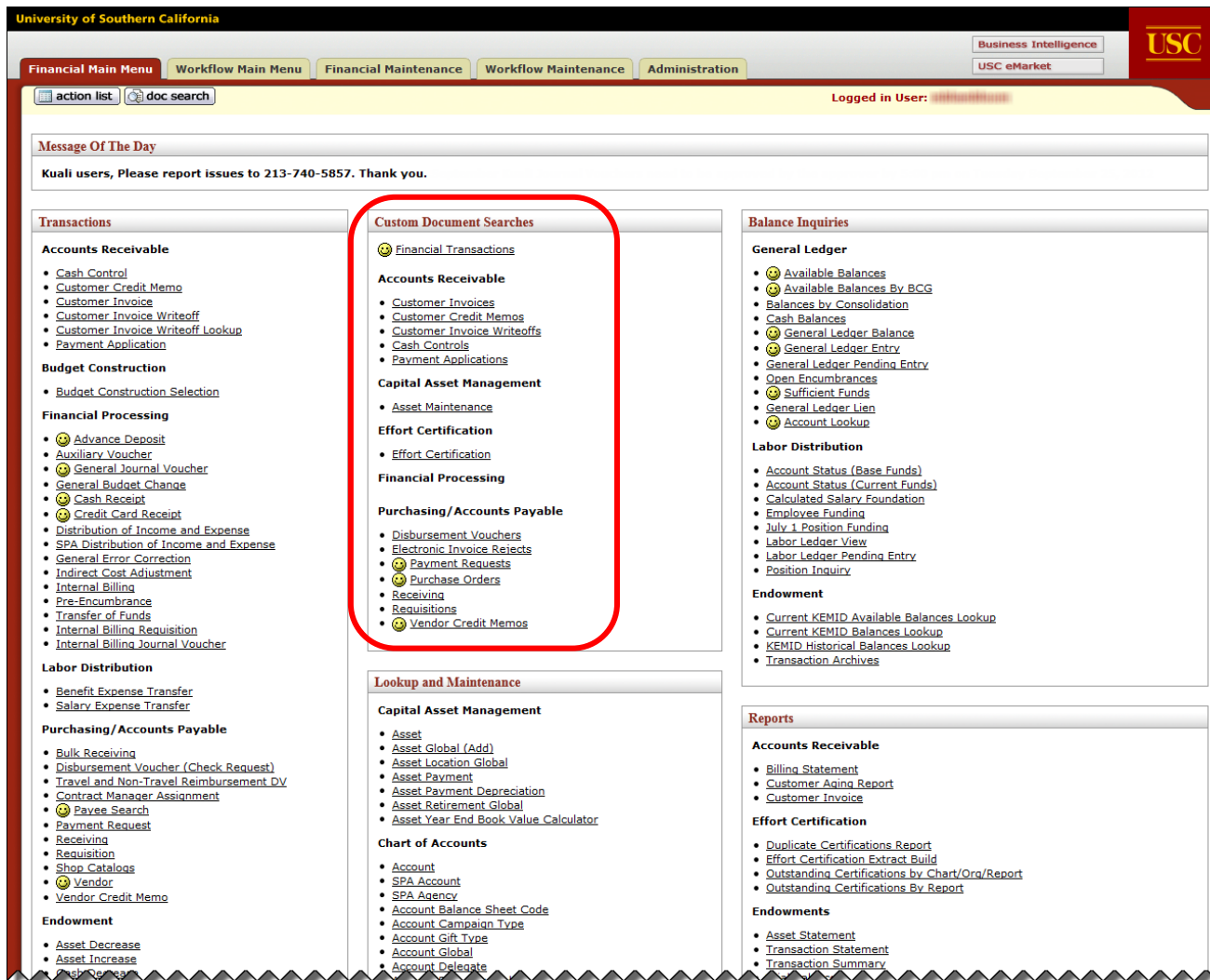



Figure 15 – Custom Document Searches section of the Kuali Financial Main Menu

As an alternative to Custom Document Searches, the Kuali system also enables you to choose between Basic and Detailed document searches. These two types of searches are compared in the next section of this guide, **Basic vs. Detailed Document Searches**.

Basic vs. Detailed Document Searches

When you click the  button, Kuali displays the **Document Lookup** screen with fields for **basic search** criteria, as shown in *Figure 16*.

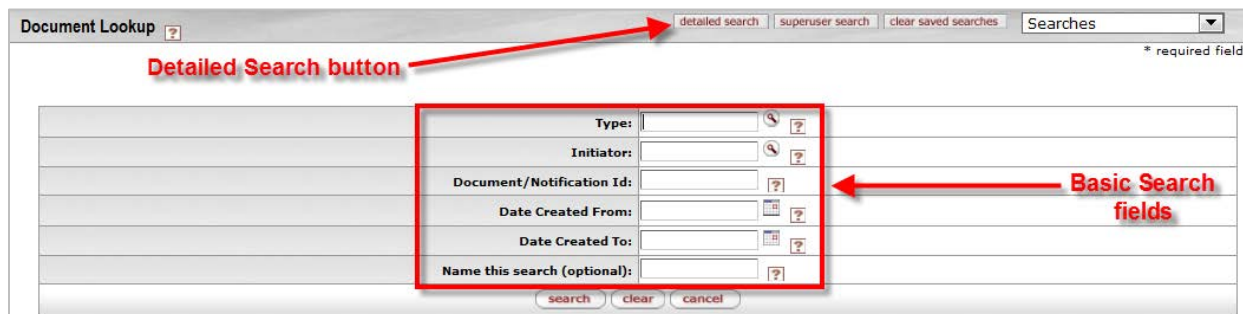


Figure 16 – Basic Search fields on the Document Lookup screen

The Document Lookup screen also offers a **detailed search** option, which enables you to specify a greater amount of search criteria, as shown in *Figure 17*. This can be especially useful when a basic search is yielding an excessive number of results. The more search criteria you specify, the more you will filter the results.

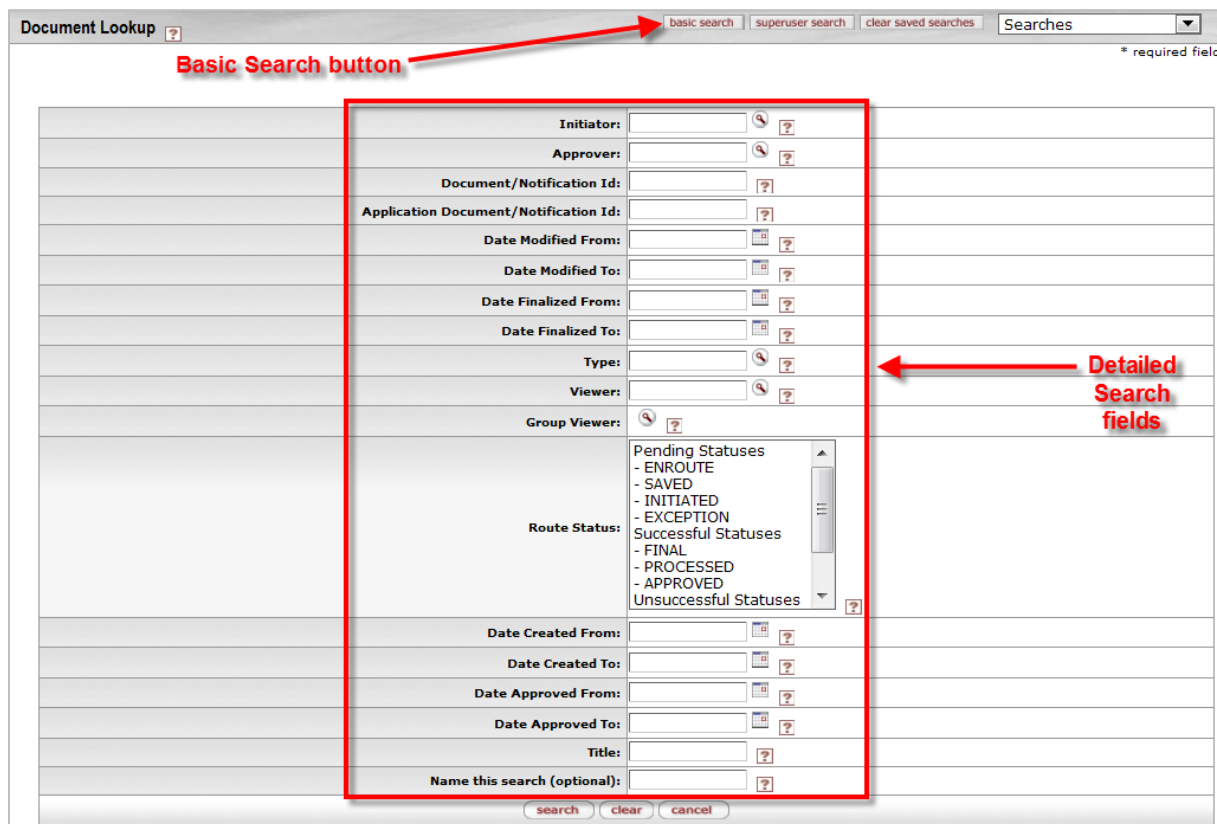




Figure 17 – Detailed Search fields on the Document Lookup screen

To switch between the basic search and detailed search screens, look to the top-center of the Document Lookup screen and click the  button or the  button. The **detailed**

search button appears when the basic search fields are displayed. When you click that button, it is replaced by the **basic search** button while the detailed search fields are displayed.

NOTE: For both the Basic and Detailed search options, after you have entered a particular document type in the **Type** field, the Document Lookup form will be refreshed to include additional fields related to that document type when you click elsewhere on the screen or press the TAB key to advance to the next field.

The refreshed search screen will usually offer the option of specifying whether you want to see results that consist of information contained in the eDoc (*Document Specific Data*) or information pertaining to the eDoc's workflow status (*Workflow Data*).

The following are some of the potential advantages of choosing the Detailed Search option:

- You can search for eDocs created and/or approved during a specific range of dates.
- You can specify a routing status level to search for eDocs at a particular route node.
- You can search for eDocs that have a specific approver.

Using Document Search to Check the Current Status of an eDoc

You can use a document search to check the current workflow status of an eDoc that you have submitted or approved, even if you do not recall the Document ID number.


- **To search for a document that you submitted**, enter your user name in the *Initiator* field when entering criteria for a document search. (If you are unsure of your user name, note that it is displayed after "Logged in User:" in the upper right-hand area of the Kuali window.) To narrow your results, use the date selector tools adjacent to the *Date Created From/To* fields to specify the date range during which you submitted the eDoc in question.
- **To search for a document that you approved**, perform a **detailed** document search (see page 20) and enter your user name in the *Approver* field when entering criteria. Use the date selector tools adjacent to the *Date Approved From/To* fields to specify the date range during which you approved the eDoc in question, and enter any other available search criteria to narrow your results.

When the results of your document search are displayed at the bottom of the page, identify the eDoc whose status you want to check, and click the document icon at the rightmost end of the same row, in the column labeled *Route Log*. The screen will change to display status information for the eDoc in question, so that you can see where it is in the approval process. (See **Route Log Tab** on page 53 for additional information about the Route Log.)

NOTE: All Kuali users can view the Route Log of any eDoc. However, a user will only be able to open an eDoc and view its contents if he/she has the necessary assigned user roles and account access privileges, or if that user is included in the eDoc's route path.

Using the Action List

The action list enables you to view and act on eDocs that require your completion by way of **Acknowledge**, **Approve**, and **FYI** action requests. There are two ways to access eDocs in your action list that require your attention:

- Log into Kuali to access your action list.** When you log into the Kuali system in the standard way (see *Logging In to Kuali* on page 5), you can click the  button in the upper left corner of the screen to view the *Inbox* of your action list (see *Figure 18*).
- Respond to system-generated email notifications.** When an Action List Reminder email message is sent to you from the Kuali system, it will include a link to access your action list. When you click that link, your browser will present the “USCnet Login” page, and after you have logged in, your action list will be displayed. However, note that when your action list is accessed in this way, it is displayed alone, without the other on-screen elements (e.g., menu tabs, document search button, etc.) that constitute the full system screen shown in *Figure 18*. Your ability to interact with the Kuali system is therefore limited to viewing and acting on eDocs in the *Inbox* of your action list. Please also be aware that if you access your action list by clicking the link in an Action List Reminder email message pertaining to an eDoc that has already been approved, an error message may be displayed because the eDoc will have moved to the *Outbox* of your action list.

NOTE: It is generally advisable to always log into the Kuali system in the standard way when you want to view the action list because it provides fuller functionality, such as the ability to select a menu tab or to perform a document search.

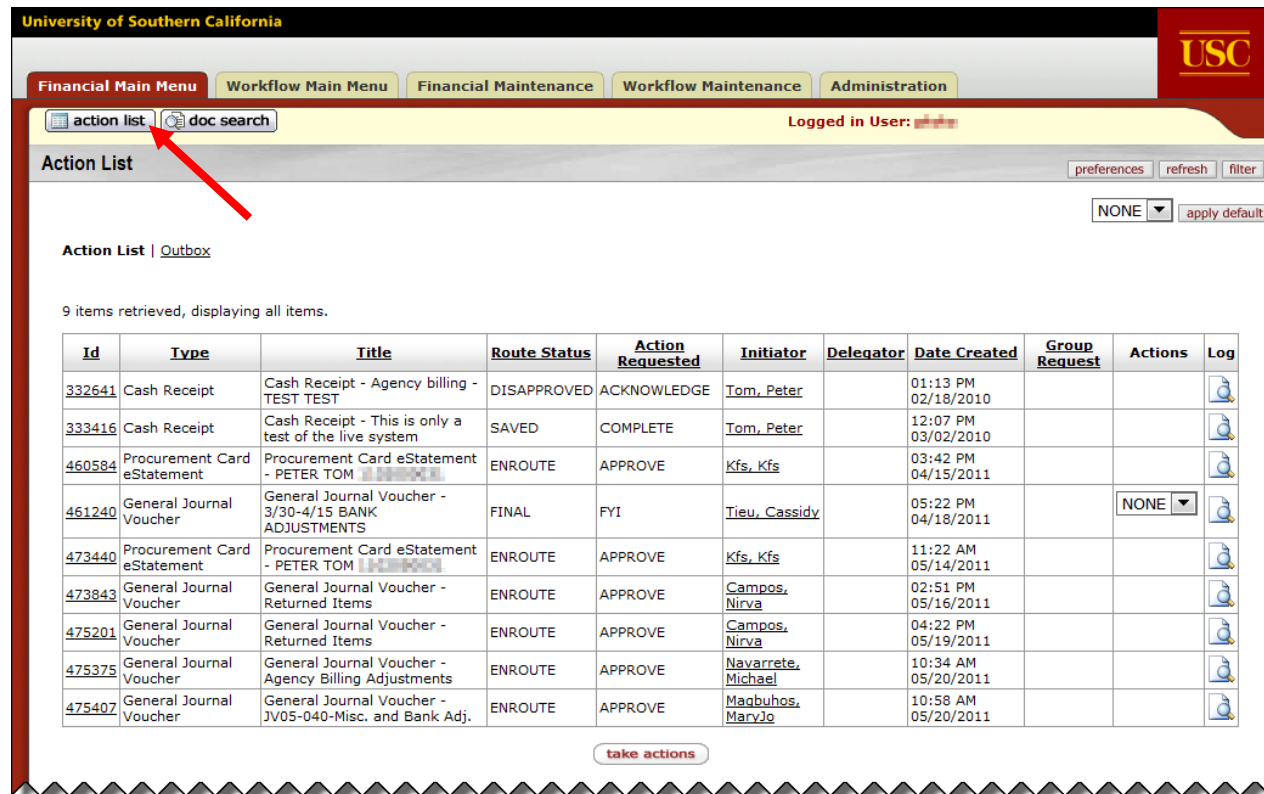


Figure 18 – eDocs shown in a user’s action list

Commonly Requested Actions

The following is a list of the actions you may be requested to take on an eDoc in your action list.

- **Approve:** The approver must open the eDoc in question, view the transaction details, and indicate whether they are acceptable by clicking **approve** or one of the other action buttons at the bottom of the eDoc form. An approved eDoc will continue routing to any additional approvers, or if fully approved, it will enter “Final” status and update its destination in the system (e.g., General Ledger, Chart of Accounts, etc.). A single eDoc may require approval from several users, at multiple route levels. An eDoc cannot proceed to “Final” status until it has received approval from all Kuali users to whom it was sent with an *Approve* request.
- **Acknowledge:** The user must open the eDoc in question and acknowledge that he/she has viewed the details of the transaction, although without the need for giving formal approval. To do this, the user has to either click the **acknowledge** button at the bottom of the screen or choose one of the other action buttons. If an eDoc has no *Approve* requests pending, but still has an outstanding *Acknowledge* request, it cannot proceed to “Final” status; instead, the eDoc’s status will change to “Processed.” When an eDoc is disapproved, an *Acknowledge* action request may be sent to the document’s prior approvers and its initiator.

NOTE: Because an *Acknowledge* request requires the user to open and review the eDoc before it can continue through the workflow nodes, it is less commonly used than the *FYI* request.

- **FYI:** This is a courtesy notification that allows users to be notified about an eDoc without delaying it from proceeding to “Final” status after all *Approve* and *Acknowledge* requests have been acted upon. An *FYI* request is the only one of the action requests for which the recipient does not have to open the eDoc and view its details (see page 24).
- **Complete:** This type of action request is shown for any eDoc with a “Saved” status, which indicates that you have saved the document without yet submitting it. Click the Document ID number of the eDoc to open it and finish entering information as needed to submit it.

Responding to an Action Request

This section discusses the primary action buttons that are used to respond to an eDoc in the Inbox of your action list, as well as the other action buttons that may also be available in some eDocs.


NOTE: Once your approval or acknowledgment for an eDoc in your action list has been recorded in the system, those action buttons are no longer shown when you open the eDoc. Moreover, that eDoc will no longer appear in the “Inbox” section of your action list because you have already taken the requested action. When you log in to the Kuali system and click the **action list** button, the Inbox portion of your action list is displayed by default, showing only items that currently require action from you. Items that you have already acted upon will appear in the “Outbox” section of your action list, which you can view by clicking the **Outbox** hyperlink in the upper left corner of the action list screen.

Responding to an “Approve” Request


To enter an action appropriate to an **Approve** action request, you must open the eDoc from the Inbox of your action list, and then click one of the action buttons displayed at the bottom of the eDoc form. For an **Approve** request, the primary response options are **approve**, **disapprove**, **return to initiator**, and **return to previous**. (The latter two buttons are discussed below in the **“Return to Initiator” and “Return to Previous” Buttons** section.) If you are satisfied with the eDoc after reviewing its contents, click **approve** and the eDoc will proceed to the next node in its route path. Note that if you click **disapprove**,


the eDoc is terminated; it will not be routed to other users for approval, and will not proceed to its ultimate destination in the system (e.g., General Ledger, Chart of Accounts, etc.). However, an *Acknowledge* action request will be sent to the eDoc's prior approvers and initiator.

Responding to an “Acknowledge” Request


To respond to an **Acknowledge** action request, you must open the eDoc from the Inbox of your action list, and then click one of the action buttons shown at the bottom of the screen when the eDoc is opened. The primary response option for an **Acknowledge** request is .

Responding to an “FYI” Request


The **FYI** action request is a courtesy notification that allows users to be notified about an eDoc without delaying it from proceeding to “Final” status after all *Approve* and *Acknowledge* requests have been acted upon. The most basic way to respond to an *FYI* action request is by clicking an  button within the eDoc itself. The following subsections of this guide explain the other ways in which you can respond when a Kuali eDoc has been routed to you with an *FYI* action request: For KFS and KEW eDocs, you can acknowledge the *FYI* request from your action list page; for a KC Proposal Development eDoc, you can delete FINAL and CANCELLED KC eDocs with *FYI* requests from your action list page. (The deletion option is not available for KFS and KEW eDocs.)

TIP: If you want to acknowledge *FYI* requests for eDocs on multiple pages in your action list, you may find it more efficient to temporarily increase the number of items listed per page. To do this, click the **Preferences** button at the top of your action list to access the Workflow Preferences page; enter a larger number in the *Action List Page Size* field; and then click the  button at the bottom of that page to reload your action list with your new setting. (See **Workflow and Action List Preferences** on page 33.)

How to Acknowledge KFS and KEW eDocs with *FYI* Action Requests

If a KFS or KEW eDoc has been routed to you with an *FYI* action request, you have two options for responding: either by opening the eDoc in question and clicking the  button at the bottom of the eDoc page, OR by acknowledging the *FYI* request from a drop-down box in your action list without even having to open the eDoc.

Acknowledge an *FYI* Action Request for a Single KFS or KEW eDoc from Your Action List

1. Open your action list.
2. Locate the KFS or KEW eDoc for which you want to acknowledge an *FYI* action request. (The *FYI* action will be shown in the *Action Requested* column.)
3. In the *Actions* column, select **FYI** in the drop-down box in the same row as the eDoc you are acknowledging.
4. Click the  button at the bottom of the action list page. Note that if you have made drop-down box selections in the *Actions* column for more than one eDoc, clicking this button will execute all of those selected actions for the eDocs on the current page.
5. If your action list includes multiple pages, repeat this same procedure on any other page that shows a KFS or KEW eDoc for which you want to acknowledge an *FYI* action request.

Acknowledge *FYI* Action Requests for Multiple KFS and KEW eDocs from Your Action List

1. Open your action list.
2. Navigate to the first page of your action list that shows KFS and KEW eDocs for which you want to acknowledge an *FYI* action request.

3. Select *FYI* in the global action drop-down box in the upper right-hand corner of the action list page, and click the adjacent button.
4. In the *Actions* column on the currently displayed page, the *FYI* selection will now appear in the drop-down boxes next to all eDocs for which *FYI* is shown in the *Action Requested* column.
Before proceeding, if there are any eDocs that you do not want to include in this mass *FYI* acknowledgment, change the drop-down selection for those individual items to NONE.
5. Click the button at the bottom of the action list page. This will execute all of the drop-down box actions selected for eDocs on the current page.
6. If your action list includes multiple pages, repeat this same procedure on any other page that shows KFS and KEW eDocs for which you want to acknowledge an *FYI* action request.

Dealing with KC (TARA) eDocs that have *FYI* Action Requests

If a Kuali Coeus (TARA) eDoc has been routed to you with an *FYI* action request, you previously had to open the eDoc in question and click the button at the bottom of the *Proposal Actions* tab within the eDoc. TARA users now also have the option of deleting KC eDocs in FINAL or CANCELLED status with an *FYI* request from their action lists without having to acknowledge the *FYI* request or even open the eDoc.

Delete a Single KC eDoc with an *FYI* Action Request from Your Action List

1. Open your action list.
2. Locate the KC eDoc that you want to delete from the list because it is in either FINAL or CANCELLED status and has an *FYI* action request. (*FYI* will be shown in the *Action Requested* column.)
3. In the *Actions* column, select DELETE in the drop-down box in the same row as the eDoc you are removing.
4. Click the button at the bottom of the action list page. Note that if you have made drop-down box selections in the *Actions* column for more than one eDoc, clicking this button will execute all of those selected actions for the eDocs on the current page.
5. If your action list includes multiple pages, repeat this same procedure on any other page that shows an eDoc in FINAL or CANCELLED status that you want to delete from the list.

Delete Multiple KC eDocs with *FYI* Action Requests from Your Action List

1. Open your action list.
2. Navigate to the first page of your action list that shows eDocs in FINAL or CANCELLED status with an *FYI* action request.
3. Select DELETE in the global action drop-down box in the upper right-hand corner of the action list page, and click the adjacent button.
4. In the *Actions* column on the currently displayed page, the DELETE selection will now appear in the drop-down boxes next to all FINAL and CANCELLED eDocs with *FYI* shown in the *Action Requested* column.
Before proceeding, if there are any eDocs that you do not want to delete from your action list at this time, change the drop-down selection for those individual items to NONE.
5. Click the button at the bottom of the action list page. This will execute all of the drop-down box actions selected for eDocs on the current page.
6. If your action list includes multiple pages, repeat this same procedure on any other page that shows FINAL or CANCELLED eDocs that you want to delete from the list.

Responding to a “Complete” Request

If an eDoc in the Inbox of your action list has a **Complete** action request, it is awaiting completion and submittal. To complete the eDoc, open it from your action list, finish entering all required information, and click . The eDoc’s status will change to “ENROUTE.” Note that if you choose the button instead, the status of the eDoc will change to “Canceled.”

“Return to Initiator” and “Return to Previous” Buttons

Approvers may find that the action buttons at the bottom of the screen for some eDocs can include one or both of a pair of buttons labeled **return to initiator** and **return to previous**. When you click either of these action buttons, Kuali will refresh the screen to display a confirmation prompt that also requires you to enter a reason for sending the eDoc back.

- The button enables you to route the eDoc back to the person who initiated it. You would use this option if you want the initiator to make corrections or additions to the information in the eDoc, or if you want the initiator to cancel the eDoc entirely.
- The button enables you to route the eDoc back to the previous route node (i.e., the approver who preceded you in the workflow routing). You would use this option if you want the previous approver to make corrections or additions to the information in the eDoc. If you are the first or only approver in the eDoc’s route path, choosing this action will return the eDoc to its initiator.

CAUTION: There is a known issue where using the **return to previous** button may cause an eDoc to become stuck in an endless loop if the initiator or any approver used ad hoc routing to send that eDoc to an additional approver. To avoid this problem, always use the **return to initiator** button instead if you need to send an eDoc back for changes.

Deleting FINAL and CANCELLED eDocs that Remain in Your Action List

When a Kuali eDoc enters FINAL or CANCELLED status, it is no longer active. System users can no longer take any action on that eDoc other than to acknowledge an *FYI* action request, if applicable. However, under certain circumstances, Kuali users may find one of these inactive eDocs in their action lists with an action request for them to *Approve* or *Complete* the eDoc, even though there is no way to take either of those actions. Prior to September 2018, the only way to remove these inactive eDocs from a person’s action list was to request that a special command be processed for each such eDoc by a database administrator.

Your action list will present a drop-down box with a DELETE command for any eDocs in FINAL or CANCELLED status that are still listed with an eligible action request: *Approve*, *Cancel*, or *Complete* (or *FYI* for KC eDocs only). This functionality enables you to delete these eDocs from your action list without having to open them, but they will not be deleted from the Kuali system itself. You and other users can still look them up by using the Doc Search function.

This functionality operates similarly to one of the two options that KFS and KEW users have for responding to an *FYI* action request: As an alternative to opening the eDoc in question and clicking an button there, they can acknowledge the *FYI* request from a drop-down box in their action list without having to open the eDoc. (For KC Proposal Development eDocs, the only way to acknowledge an *FYI* action request is by clicking an button at the bottom of the *Proposal*

Actions tab within the eDoc. However, TARA users now also have the option to delete FINAL and CANCELLED KC eDocs from their action lists.)

TIP: If you need to remove inactive eDocs from multiple pages in your action list, you may find it more efficient to temporarily increase the number of items listed per page. To do this, click the **Preferences** button at the top of your action list to access the Workflow Preferences page; enter a larger number in the *Action List Page Size* field; and then click the **save** button at the bottom of that page to reload your action list with your new setting. (See **Workflow and Action List Preferences** on page 33.)

How to Delete Inactive eDocs from Your Action List

If any eDocs with a status of FINAL or CANCELLED have been routed to you with an action request of *Approve*, *Cancel*, or *Complete* (plus *FYI* for KC eDocs), you can now use either of the following methods to delete those eDocs from your action list. (You cannot delete KFS and KEW eDocs with a requested action of *FYI*, but they will be removed from your action list when you acknowledge the *FYI* request.)

Delete a Single eDoc in FINAL or CANCELLED Status from Your Action List

1. Open your action list.
2. Locate the eDoc that you want to delete from the list because it is in FINAL or CANCELLED status and has one of the eligible action requests in the *Action Requested* column.
3. In the *Actions* column, select DELETE in the drop-down box in the same row as the eDoc you are removing.
4. Click the **take actions** button at the bottom of the action list page. Note that if you have made drop-down box selections in the *Actions* column for more than one eDoc, clicking this button will execute all of those selected actions for the eDocs on the current page.
5. If your action list includes multiple pages, repeat this same procedure on any other page that shows an eDoc in FINAL or CANCELLED status that you want to delete from the list.

Delete Multiple eDocs in FINAL or CANCELLED Status from Your Action List

1. Open your action list.
2. Navigate to the first page of your action list that shows eDocs in FINAL or CANCELLED status with one of the eligible action requests in the *Action Requested* column.
3. Select DELETE in the global action drop-down box in the upper right-hand corner of the action list page, and click the adjacent **apply default** button.
4. In the *Actions* column on the currently displayed page, the DELETE selection will now appear in the drop-down boxes next to all FINAL and CANCELLED eDocs with one of the eligible action requests.
Before proceeding, if there are any eDocs that you do not want to delete from your action list at this time, change the drop-down selection for those individual items to NONE.
5. Click the **take actions** button at the bottom of the action list page. This will execute all of the drop-down box actions selected for eDocs on the current page.
6. If your action list includes multiple pages, repeat this same procedure on any other page that shows FINAL or CANCELLED eDocs you want to delete from the list.

Additional Action Buttons

The following action buttons may also be available to you as options for responding to eDocs in your action list, depending on your user role and the eDoc's document type and current status.

send ad hoc request

Routes the eDoc to the users or groups that you have specified in the Ad Hoc Recipients tab, with the requested action that you have selected.

save

Saves the eDoc as it currently appears, retaining any changes that you have entered. The saved eDoc will then wait in the Inbox of your action list for you to take further action on it. You should use the **Save** action if you need to leave your computer before you have completed an eDoc. You can later re-open it from your action list to resume entering data so that you can submit it.

reload

Reloads the eDoc in its last saved form. Reloading is a method of undoing any modifications made on-screen since the most recent **Save** action.

copy

Copies the eDoc as it currently appears, creating a new document containing the same information, but with a new Document ID number. Any unsaved changes shown on-screen when this button is clicked are included in the new document, but not saved in the old eDoc. Thus, this button enables you to use an existing eDoc as a template for creating similar new ones. (For instructions and important information about using this function, please see **Creating a New eDoc by Copying an Existing One** on page 57.)

close

Closes the eDoc without saving any changes. The document will remain in its most recent saved state, retaining no changes or additions that you may have made since then.

Account Delegation (for DV and DVQE eDocs)

A Kuali system user who has been given the necessary access rights can be designated as an *account delegate* — someone who is authorized to act on behalf of an account's Fiscal Officer in taking workflow actions on an eDoc. Within the Kuali system at USC, account delegation is specific to the Fiscal Officer's responsibility for financial approval of Disbursement Voucher (DV) and Disbursement Voucher Quick Expense (DVQE) eDocs. Only one Fiscal Officer can be assigned per account, but the Fiscal Officer may assign one or more account delegates for a department, based on either organization codes and/or account numbers. The *Delegator* column in your action list will show whether you have received a particular action request because you are an account delegate.

An authorized account delegate can perform almost any action that is available to a Fiscal Officer, such as approving or disapproving a transaction, or returning an eDoc to its initiator or to a previous approver for corrections, additional information, or cancelation. Some responsibilities of the Fiscal Officer cannot be delegated, such as exceptions that require SBO approval.

Two types of delegates can be established: *Primary* and *Secondary*.

- **Primary Delegate.** The Fiscal Officer can assign only one Primary Delegate per account, based on account number or organization code. Note that DV and DVQE eDocs for accounts with a designated Primary Delegate are routed directly to the Primary Delegate's action list. Those eDocs will not appear in the Fiscal Officer's action list unless he/she applies a special action list filter (see the description of the **Primary Delegate ID** filter in **Table 5** on page 31).

- **Secondary Delegate.** Secondary Delegates serve as backup approvers for the Fiscal Officer and (if applicable) the Primary Delegate. The Fiscal Officer can designate one or more Secondary Delegates per account number or organization code, regardless of whether a Primary Delegate has been assigned. DV and DVQE eDocs are not routed directly to the action lists of Secondary Delegates; they are routed to the Primary Delegate, if one has been assigned, or to the Fiscal Officer. Secondary Delegates must apply a special action list filter (see the description of the **Secondary Delegator ID** filter in **Table 5** on page 31) if they want their action lists to display delegated eDocs requiring action.

The Fiscal Officer may designate Secondary Delegates without designating a Primary Delegate. In such situations, all action requests for affected eDocs are routed to the Fiscal Officer.

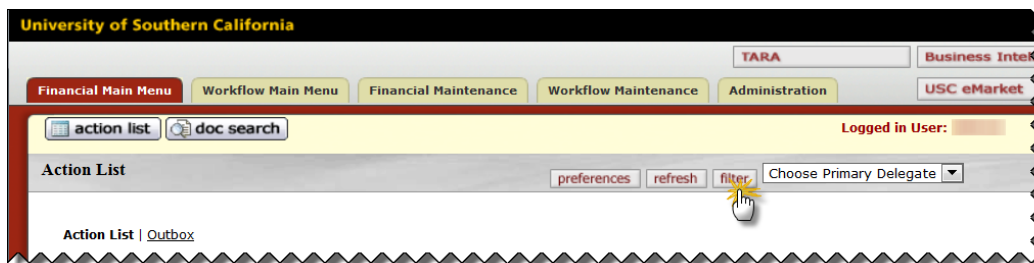
NOTE: An individual user who is the Fiscal Officer for certain accounts may also be designated as a Primary or Secondary Delegate for other accounts. However, the Fiscal Officer for a particular account should never be assigned a delegate role for that same account, as that is unnecessary duplication.

Action List Filter and Preferences

Action List Filter

Setting a filter allows you to display a limited subset of items in your action list. (Also see *Workflow and Action List Preferences* on page 33.)

1. Click the **filter** button at the top of your action list to display the **Action List Filter** dialog box.



2. Specify any desired filtering criteria in the **Action List Filter** dialog box shown in *Figure 19*. The filter parameters are described in *Table 5* on the following page. Filter parameter options will vary according to each user’s assigned roles and permissions.

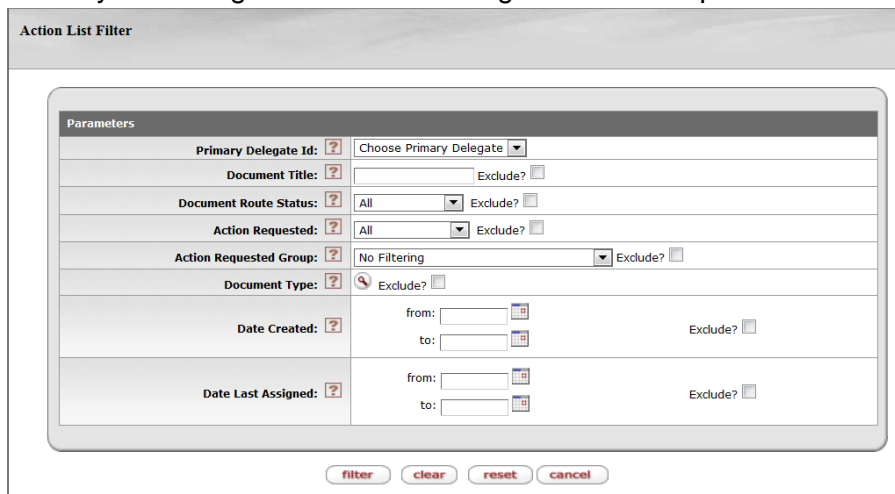


Figure 19 – Available action list filter parameters

3. Click the **filter** button at the bottom of the **Action List Filter** dialog box. The system will refresh the page and display a message in the upper left corner, confirming the filter you have applied and reporting the number of items found by applying that action list filter (see the example shown in *Figure 20*).

NOTE: You might not see a filter confirmation message when using the **Primary Delegate ID** or **Secondary Delegator ID** filter described in *Table 5*.




The screenshot shows the 'Action List' interface. At the top right, there are buttons for 'preferences', 'refresh', 'filter', and 'clear filter'. Below these, the text 'Action List | Outbox' and 'Filtered by Date Created' is displayed, with a red arrow pointing to it. Below that, it says '7 items retrieved, displaying all items.' with another red arrow pointing to it. The main part of the screenshot is a table with the following data:

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>
3190860	Disbursement Voucher	Disbursement Voucher - CILECT-S-Payment of fees on behalf of SC [N:A:N]	ENROUTE	APPROVE	Lynn, Stacey		03:25 PM 02/02/2015	08:49 AM 02/04/2015
3192689	Disbursement Voucher	Disbursement Voucher - InternationalAssoco-S-2015 Annual IATUL [N:A:N]	ENROUTE	APPROVE	Felix, Christina		09:54 AM 02/03/2015	03:09 PM 02/04/2015
3194299	DVQE Reimbursement (Travel & Non-Travel)	DVQE Reimbursement (Travel & Non-Travel) - Coretti, Cristiano-DVQE-Expenses incurre [N:A:N]	ENROUTE	APPROVE	Romero, Elizabeth		12:17 PM 02/03/2015	10:41 AM 02/04/2015
3200811	Role	Role - CCC Module	EXCEPTION	APPROVE	Bloom, Marc		02:01 PM 02/06/2015	
3200826	Role	Role - CCC Module	EXCEPTION	APPROVE	Bloom, Marc		03:09 PM 02/06/2015	
3200837	Kuali - User Access Request Document	Kuali - User Access Request Document - test for documentation	SAVED	COMPLETE	Bloom, Marc		03:44 PM 02/06/2015	
3201077	Advance Deposit	Advance Deposit - test	SAVED	COMPLETE	Bloom, Marc		01:52 PM 02/16/2015	

Figure 20 – Filter confirmation messages and result reports are displayed above the Document ID column.

Table 5. Action List Filter Parameters

Filter Parameter	Description
Primary Delegate ID	<i>Only displayed if you are a Fiscal Officer.</i> Use this drop-down list to filter your action list if you want to view only DV and DVQE eDocs with action requests directed to you that were automatically routed to the Primary Delegates assigned to the accounts affected by those eDocs. (The system automatically routes DVs and DVQEs with action requests to the Primary Delegate rather than to the Fiscal Officer.) The drop-down list will present Primary Delegate names for only those items currently awaiting action. You can choose to view items that have been routed to one or all of your Primary Delegates.
Secondary Delegator ID	<i>Only displayed if you are a Secondary Delegate.</i> Use this drop-down list to filter your action list if you want to view only DV and DVQE eDocs that were routed to the Fiscal Officer or Primary Delegate with action requests where the account that will be affected is one for which you are designated as a Secondary Delegate. The drop-down list will present Fiscal Officer names for only those items currently awaiting action. You can choose to view items for one or all of those delegators.
Document Title	If you want your action list to display only eDocs that have a particular title (document description), enter a partial or full character string that you are looking for. For example, enter <i>Test</i> to see all eDocs that contain “Test” in the document description. This field is case sensitive. Select the Exclude? check-box to exclude documents with the specified title from the list.

Filter Parameter	Description
Document Route Status	You can select an option in this drop-down list if you want your action list to display only eDocs that currently have a particular route status. The choices in the list are <i>All</i> , <i>Approved</i> , <i>Disapproved</i> , <i>ENROUTE</i> , <i>Exception</i> , <i>Processed</i> , and <i>Saved</i> . Select the Exclude? check-box to exclude documents with the selected status from the list.
Action Requested	Select an option in this drop-down list if you want your action list to display only eDocs that are currently awaiting a particular requested action. The choices in the list are <i>Acknowledge</i> , <i>Approve</i> , <i>Complete</i> , and <i>FYI</i> . Select the Exclude? check-box to exclude documents with the selected action from the list.
Action Requested Group	Select an option in this drop-down list if you want your action list to display only eDocs that are currently awaiting an action from a particular group.
Document Type	If you want your action list to display only eDocs of a particular Document Type, click  to select the desired document type from the Document Type lookup page. Select the Exclude? check-box to exclude eDocs of the selected type from the list.
Date Created	Enter a date range or select dates from the calendar by clicking the Calendar  to limit the eDocs displayed in your action list based on the date they were created. Select the Exclude? check-box to exclude eDocs that were created during the specified time range. The acceptable format is <i>mm/dd/yyyy</i> .
Date Last Assigned	Enter a date range or select dates from the calendar by clicking the Calendar  to limit the eDocs displayed in your action list based on the date that each of these action items was generated. Select the Exclude? check-box to exclude eDocs that entered your action list during the specified time range. The acceptable format is <i>mm/dd/yyyy</i> .

Clearing the Action List Filter

Click the **clear filter** button (shown below in *Figure 21*) to remove the current action list filter settings and view the entire list. This button is only visible when you have applied an action list filter to display a limited set of items in your action list.



Figure 21 – Click the *Clear Filter* button if you want to remove the action list filter currently in effect.

Workflow and Action List Preferences

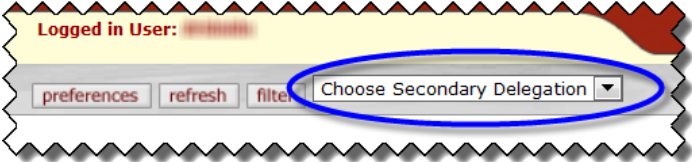
The system allows you to change the automatic refresh rate, action list page size, email notification frequency, and row colors that indicate the status of the document. Additionally, you can limit the set of documents displayed in your action list by setting filters. (Also see the settings discussed earlier in the **Action List Filter** section that starts on page 30.)

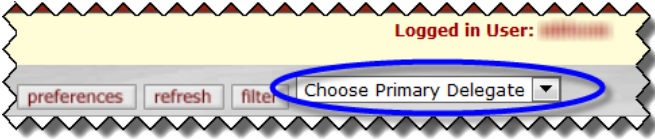
To make any of these changes, click the **preferences** button located at the top of your action list (see *Figure 22*).



Figure 22 – Click the Preferences button in the action list to make changes in how your action list is displayed.

The **Workflow Preferences** screen is displayed, as shown in *Figure 23* on the following page. The various preference options available on this screen are described in *Table 6* (see page 34).

Preference Option	Description
<p>Email Notification</p>	<p>The option you select in this drop-down list determines how often the system will send you an email message to notify you that items requiring your attention have arrived in your action list. Choices are <i>None</i>, <i>Daily</i>, <i>Weekly</i>, or <i>Immediate</i>. (It is not recommended to select <i>None</i>, unless you make it a point to log in to Kuali frequently to check the Inbox of your action list.)</p>
<p>Receive Primary Delegate Emails</p>	<p><i>Applicable only if you are a Fiscal Officer.</i> Select this check-box if you want to receive an email notification when an eDoc with an action request directed to you is routed to the user designated as the Primary Delegate for the relevant account. (DVs and DVQEs with action requests are automatically routed to the Primary Delegate rather than to the Fiscal Officer.)</p>
<p>Receive Secondary Delegate Emails</p>	<p><i>Applicable only if you are a Secondary Delegate.</i> Select this check-box to receive an email notification when a DV or DVQE eDoc arrives in the action list of a Fiscal Officer or Primary Delegate for an account on which you have been designated as a Secondary Delegate. To view these items in your action list, use one of the delegator filters described next.</p>
<p>Delegator Filter</p>	<p><i>Applicable only if you are a Secondary Delegate.</i> The option that you choose in this drop-down list determines whether the Choose Secondary Delegation filter will appear next to the filter button at the top of your action list page. That drop-down filter provides a convenient way to have your action list display items awaiting action that have been delegated to you by the Fiscal Officer for the relevant accounts. Those items will <u>not</u> appear in your action list unless you apply this special filter.</p> <ul style="list-style-type: none"> • Secondary Delegators only on Filter Page – If this option is selected, the Choose Secondary Delegation drop-down filter will <u>not</u> be displayed on your action list page. Whenever you want your action list to display items from one or all of your secondary delegators, you will have to use the Secondary Delegator ID drop-down filter on the Action List Filter dialog box (described in Table 5 on page 31). • Secondary Delegators on Action List Page – If you select this option, the Choose Secondary Delegation drop-down filter will be displayed at the top of your action list page (as shown below) so that you can view a filtered set of items from one or all of your secondary delegators. (The Secondary Delegator ID drop-down filter on the Action List Filter dialog box is always available to you, as well.)  <p>The screenshot shows a user interface element with a yellow background and a red border. At the top, it says 'Logged in User: [username]'. Below this, there are four buttons: 'preferences', 'refresh', 'filter', and a dropdown menu labeled 'Choose Secondary Delegation'. The dropdown menu is highlighted with a blue circle.</p>

Preference Option	Description
<p>Primary Delegate Filter</p>	<p>Applicable only if you are a Fiscal Officer. The option that you choose in this drop-down list determines whether the Choose Primary Delegate filter will appear next to the filter button at the top of your action list page. That drop-down filter provides a convenient way to have your action list display items with action requests that have been routed to a Primary Delegate. (The system automatically routes action requests for DV and DVQE eDocs directly to the Primary Delegate. Those items will <u>not</u> appear in your action list unless you apply this filter.)</p> <ul style="list-style-type: none"> • Primary Delegates only on Filter Page – If this option is selected, the Choose Primary Delegate drop-down filter will <u>not</u> be displayed on your action list page. Whenever you want your action list to display items that have been routed to one or all of your Primary Delegates, you will have to use the Primary Delegate ID drop-down filter on the Action List Filter dialog box (described in Table 5 on page 31). • Primary Delegates on Action List Page – If you select this option, the Choose Primary Delegate drop-down filter will be displayed at the top of your action list page (as shown below) so that you can view a filtered set of items that have been routed to one or all of your Primary Delegates. (The Primary Delegate ID drop-down filter on the Action List Filter dialog box is always available to you, as well.) 
<p>Fields Displayed in Action List</p>	<p>Select or clear these check-boxes to specify which items will be included among the fields displayed in your action list.</p>
<p>Document Route Status Colors for Action List Entries</p>	<p>For each document route status, select the color option that will be used to identify rows in your action list containing eDocs that currently have that route status. (See <i>Figure 20</i> on page 31 for an example.) Note that new color changes for the rows in your action list will not take effect until the next time that you log in to Kuali.</p>



To save your preferences, click **save**.



To return to the default preferences, click **reset**.



To close the Workflow Preferences screen without saving any changes you have made, click **cancel**.

NOTE: Workflow preference options will vary according to each user's assigned role and permissions.

Standard Tabs in eDocs

Although the tabs contained in various eDocs may vary from one document type to another, a set of standard tabs is included in every eDoc. All eDocs contain the **Document Overview**, **Notes and Attachments**, **Ad Hoc Recipients**, and **Route Log** tabs. Additionally, financial transaction eDocs contain the **Accounting Lines** tab and the **General Ledger Pending Entries** tab. Another tab, **Capital Edit**, is included on many, but not all, financial transaction documents. These standard tabs are described in the following sections of this guide.

Document Overview Tab

The **Document Overview** tab identifies the document and includes the following fields: **Description**, **Explanation**, and **Organization Document Number**. Financial transaction eDocs also include an additional field labeled **Total Amount**. All of these fields are shown in *Figure 24*.

Figure 24 – Document Overview tab

The **Description** field has a 40-character limit. It is a required field on every eDoc because it is used to identify the document and is included in document search results, action list entries, General Ledger inquiries (for financial transaction eDocs), and standard reports. The text that you enter here should function as a summary description that would be useful in identifying the contents of the eDoc. However, because the contents of this field will be viewable by all other users in document search results, be careful to never enter any sensitive or confidential information here.

Document Id	Type	Title	Route Status	Action Requested	Initiator	Delegator
311424	Kuali Payment Request	PaymentRequest - PO: 1002 Vendor: ABC CLEANING SERVICES	ENROUTE	APPROVE	HUNTLEY, KEISHA	
311458	CashReceiptDocument	Cash Receipt - Deposit Refund	ENROUTE	APPROVE	TOM, WESLEY	

Figure 25 – An eDoc’s description is displayed as the title in a user’s action list.

The **Explanation** field allows you to include additional information about the document.

The **Organization Document Number** field is not used by USC at this time.

The **Total Amount** field (included on financial transaction eDocs) is updated when the document is submitted successfully, as can be seen in the example shown in *Figure 26*.

Cash Receipt ?

Doc Nbr: 673175	Status: ENROUTE
Initiator: [redacted]	Created: 12:34 PM 09/14/2012

Document was successfully submitted. expand all collapse all

* required field

Document Overview hide

* Description: Cash Receipt eDoc example	Explanation: cash / checks
Organization Document Number:	

Financial Document Detail

Total Amount: 2,561.28

Report show

Deposit Slip Number show

Cash Reconciliation show

Currency and Coin Detail show

Check Detail show

Accounting Lines hide

Accounting Lines ? hide detail									
	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions
	SC Southern California							0.00	
add: Line Description add									
1	SC Southern California	PHARMACY DISPENSARY		02100 SALES AND SERVICE BCG 20				2,561.28	
Total: 2,561.28									

Figure 26 – Total Amount is displayed when the document is submitted.

Table 7. Document Overview Tab Fields

Field Name	Description
Description	Required. Enter a short description for the document. The description appears in the G/L Inquiry, standard reports, action list, and document search as a primary identification of the document.
Explanation	Optional. Enter a more detailed explanation of the document than the information supplied in the Description field.
Total Amount	Display-only. Displays the total amount from the Accounting Lines tab when the document is submitted successfully.
Organization Document Number	<i>Not currently in use at USC.</i>

Accounting Lines Tab

Accounting information for a financial transaction is entered in the **Accounting Lines** tab. This is where the accounting string data is entered. The required fields and the format of the tab vary slightly by document type. The **Amount** field may also look different, depending on the type of document you are creating.

Accounting Lines									
* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions	
SC							0.00		
add: Line Description									
SC	100112001		00112				215.37		
1 Line Description									
Student overpay Q1 applied to Q2 tur									
							Total: 215.37		

Figure 27 – Accounting Lines tab

The standard **Accounting Lines** tab is shown in *Figure 27* above. Every Procurement Card eDoc has an additional section on the Accounting Lines tab. In *Figure 28* below, you can see transaction details (such as the credit card number, card holder’s name, transaction date, and vendor’s name) in the **Transaction** section just above the Accounting Lines section.

Displaying Account Detail

Descriptive details for the accounting line data (like those circled in *Figure 28*) may be hidden or shown by clicking the **hide detail** and **show detail** buttons. Only one of these buttons is displayed at a given time. After you click whichever button is currently displayed, the system displays the alternate option.

Accounting Lines									
* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions	
SC	1212040006		15100				9.48		
1 Details									
							Total: 9.48		

Figure 28 – Account details showing on the Accounting Lines tab

Accounting Lines									
* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions	
SC	1212040006		15100				9.48		
							Total: 9.48		

Figure 29 – Account details hidden on the Accounting Lines tab

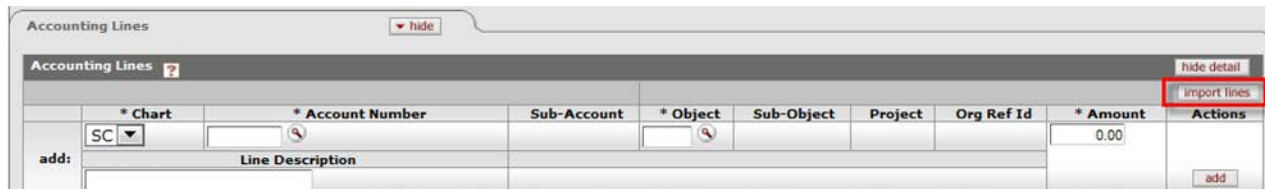
Accounting Lines Action Buttons

The accounting lines action buttons offer the following options.

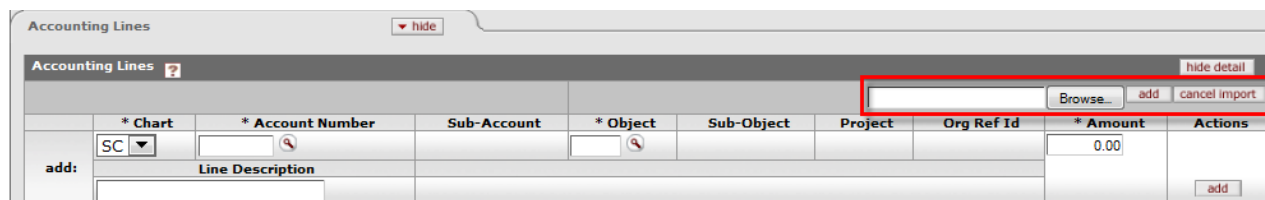
- Click **add** to add an accounting line to the document. When you click **add**, Kuali validates the account number, expiration status, and business rules specific to the document type.
- Click **delete** to delete the accounting line.
- Not active at this time. Reserved for future use.*

Import Lines

If you have a number of accounting lines to enter, you can use a program such as Microsoft Excel to create a file in **.CSV** (comma-separated values) format containing several transactions, and then import the lines into the eDoc. The maximum number of line entries that you can import is 300.



- When you click the **import lines** button, it is replaced by other controls (see following example) that enable you to import accounting lines from a **.CSV** file into your document. These other controls are described below.

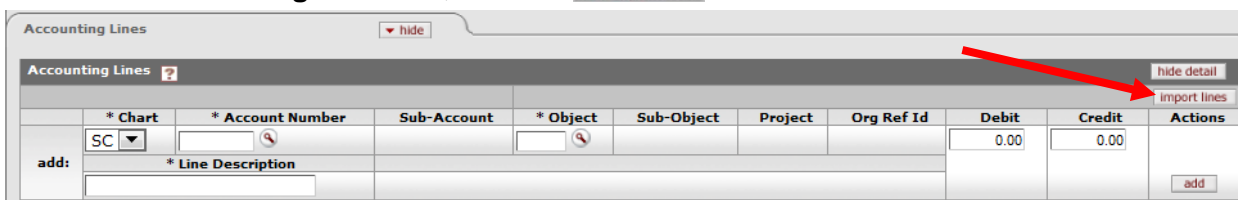


- Click **Browse...** to select the desired import file from your hard drive or network.
- Click **add** to import the file that you have selected.
- Click **cancel import** if you want to stop your **import lines** task. When the “import lines” task ends, the **Accounting Lines** section returns to its default state with only the **import lines** button displayed.

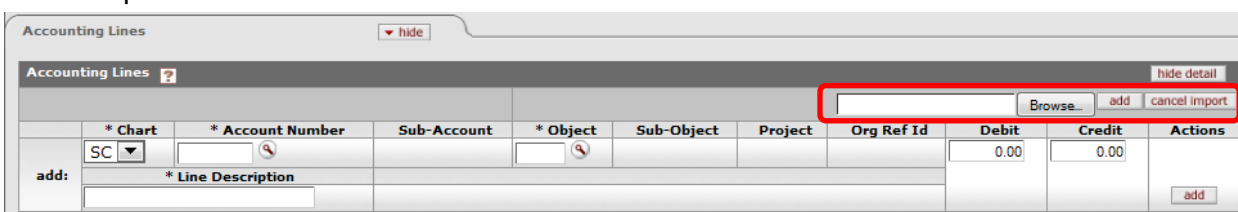
Import Template Files

To simplify the creation of **.CSV** import files, you can download specially created Microsoft Excel worksheets that are designed to be used as templates for several specific eDoc types. The template files are organized from left to right, with column headings that correspond to the labeled fields on the **Accounting Lines** tab of each particular eDoc type. Links to all currently available import templates can be found on-line on the [User Guides and Training page](#) of the [Kuali@USC website](#). The basic procedure for using any of the import template files is the same:

1. Open a copy of the template file designed for the type of eDoc into which you intend to import the data.
2. Starting in the first row below all the headings and instructions (usually row 3 or 4), enter data in the appropriate columns. Remember that there is a 40-character limit per entry in the optional Line Description column, and the maximum number of line entries allowed in the template is 300.
3. When you have finished entering data to be imported, you must delete the heading rows of the template file, which serve as a guide when entering your data. This step is necessary because the import function does not differentiate between column headings, instructions, and your data. Follow these steps to delete the first three rows:
 - a. Using your mouse, select the rows to be deleted.
 - b. Right-click on the now-highlighted rows to display a drop-down list of commands.
 - c. Select the **Delete** command.
4. Save a copy of your import file as a .CSV (comma delimited) file, by following these steps:
 - a. Select **File**, then **Save As**.
 - b. Click the **Save as type** drop-down menu.
 - c. Select **CSV (comma delimited)** from the available choices.
 - d. If a dialog box is displayed, asking whether you want to keep the CSV (Comma delimited) format, click **Yes**.
5. Close the template file, and open the eDoc into which you will now import your data.
6. On the **Accounting Lines** tab, click the **import lines** button.



The Accounting Lines tab will change to include additional controls, as shown in the following example.



7. Click the **Browse...** button to open a dialog box that will enable you to navigate to the location of the .CSV import file you saved.
8. Select your import file and click the “Open” button.
9. When the name of the import file is displayed in the field next to the **Browse...** button on the **Accounting Lines** tab of your eDoc, click the **add** button to import the data.
10. After the line entries have been imported from your .CSV file, you can manually add other lines or make any changes that may be needed in the imported lines.

Accounting Line Error Messages

When an account number, Object Code, or other field entry is not found in the search tables, Kuali displays an error message. When you click elsewhere on the screen, press the TAB key, or place your cursor in another field, the error message displays in red, below the field in question.

The screenshot shows the 'Accounting Lines' form with a table containing one row. The 'Account Number' field contains '000200084' and has a red error message 'account not found' displayed below it. The 'Amount' field contains '0.00'. There is an 'add' button at the bottom right of the table.

When you click the **add** button, the error message appears above the line item you want to enter in the document.

The screenshot shows the 'Accounting Lines' form with an error message box at the top: 'Errors found in this Section' followed by a list item 'The specified Account Number does not exist.' Below the error message, the table has one row with 'Account Number' '1001180402' and 'Object' '00125 REVENUE'. The 'Amount' field contains '321.95'. There is an 'add' button at the bottom right of the table.

The following are examples of some error messages that may be displayed in the **Accounting Lines** tab in various eDocs.

Account Number Error Messages

account not found.

* Account Expired Override
 SUMMER COLLEGE TUITION (expires: 2009-06-30)

Errors found in this Section:

- Account number is a required field.
- The specified Account Number does not exist.
- Account 1234567890 is closed. Account must not be closed.
- Account 1234567890 has expired. Please use the recommended continuation account SC 1234567891 or use a different account.

Object Code Error Messages

object not found.

Errors found in this Section:

- Object Code (Object) is a required field
- The specified Object does not exist.
- The specified Object is inactive.

Dollar Amount Error Messages

⊖ Errors found in this Section:

- "\$0.00" amounts and negative amounts are not allowed on an accounting line.
- ABCD is not a valid amount.
- Invalid value 1.234: at most 2 digits may follow the decimal point.
- You cannot enter an amount into both the "Credit" and "Debit" columns for a given accounting line. You can only enter an amount into one or the other per accounting line.

Clearing Accounting Line Error Messages

Correcting the error and resubmitting or saving the document will clear the error message. If the error message pertains to an accounting line entry, you may be able to clear the message by correcting that entry and clicking the **add** button again.

Capital Edit Tab

The **Capital Edit** tab appears as a standard tab on many, but not all, financial transaction eDocs. (For instance, it is not currently in use on Procurement Card Reallocation eDocs or eStatements.) If one or more financial transactions detailed in the eDoc pertain to an existing or newly acquired capital asset — generally meaning movable equipment costing \$5,000 or more — this tab enables users to update the asset database accordingly.

This tab **must** be completed if a Capital Equipment Object Code is entered in the *Object* field of an entry on the **Accounting Lines** tab in the eDoc. When the eDoc is approved, any accounting line entries that include a Capital Equipment Object Code will be used to update the asset database by associating the payment information with the capital asset specified in the Capital Edit tab.

NOTE: Currently, the **Capital Edit** tab can only be used to associate **one** new or existing capital asset with transactions itemized in that eDoc. Therefore, financial transactions that pertain to separate assets must be submitted in separate eDocs. For example, the **Accounting Lines** tab in a Credit Card Receipt eDoc may contain entries for multiple transactions, but if two or more of those accounting lines include a Capital Equipment Object Code, they must pertain to the same individual capital asset or else the eDoc cannot be submitted.

The screenshot shows the 'Capital Edit' tab interface. At the top, there is a 'hide' button. Below it is the 'Retrieve Asset to be Updated' section, which includes an 'Asset Number' search field. A message states: 'This tab is required when a capital asset (i.e. movable equipment object code) is entered. Please contact Equipment Management at 213-821-2880 or equipmgt@usc.edu for additional assistance.' The 'Create New Assets' section contains a table with columns: Asset Quantity, Asset Type, Vendor Name, Manufacturer, and Model. Below this is an 'Asset Description' text area and an 'Action' section with 'add' and 'clear' buttons. At the bottom, there is a table with columns: Tag Number, Serial Number, * Campus Code, * Building Code, * Room Number, Sub Room, and Action (delete).


Figure 30 – Capital Edit tab with both *Retrieve Asset to be Updated* and *Create New Assets* sections displayed

As can be seen in *Figure 30*, the **Capital Edit** tab includes two sections — **Retrieve Asset to be Updated** and **Create New Assets** — which are described next in this guide. Depending on the type of transactions detailed in the eDoc, one or both sections may be displayed. Both sections are displayed in JV eDocs, but just one section should be completed. Only the **Retrieve Asset to be Updated** section is displayed in Cashiering eDocs.

For JV eDocs, if any of the accounting line entries include a Capital Equipment Object Code, then first-level Comptroller’s Office approvers will use Ad Hoc routing to send the JV eDoc to the university’s Equipment Management department with an *FYI* action request when necessary.

Retrieve Asset to be Updated

This section of the **Capital Edit** tab enables you to retrieve information about an existing asset in order to associate it with one or more of the financial transactions detailed in the eDoc. When a financial transaction eDoc that modifies an existing asset is approved, the asset record for the specified asset number will be updated to include that payment information in the asset database.



The **Retrieve Asset to be Updated** section contains only one field: *Asset Number*. Completion of this field is required if an accounting line in the eDoc pertains to an asset that already has a record in the asset database. You can enter the relevant asset number manually or click the adjacent lookup  icon to search for the asset in question and select its asset number from the search results.




- An existing asset can be modified only if a Capital Equipment Object Code is displayed in the *Object* field of the accounting line entry on the **Accounting Lines** tab.
- The asset number specified here must identify an active, valid asset. Active assets have an Inventory Status Code of **A** (Active), **N** (Non-Capital Asset), or **U** (Under Construction).
- The specified asset number will be locked in the system until the financial transaction eDoc is approved, canceled, or disapproved.

Create New Assets

This section of the **Capital Edit** tab enables you to submit the information needed to create a new record in the asset database and associate it with one or more financial transactions detailed in the eDoc. When the eDoc is approved, this new asset record will be updated to include that payment information in the asset database.

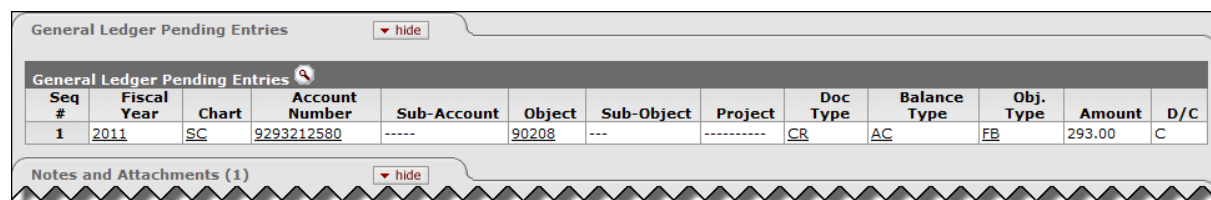
Table 8. Fields and Controls in the Create New Assets section of the Capital Edit Tab

<i>Field Name or Control</i>	<i>Description</i>
Asset Quantity	Required. Enter the number of assets for which you are creating a new record in the asset database. NOTE: Currently, the Capital Edit tab can only be used to create a record for one asset, and you must enter the number 1 in this field.
Asset Type	Required. Enter the code that identifies the type of asset for which you are creating a record. You can click the adjacent lookup  icon to search for the appropriate code using the Asset Type Lookup form.
Vendor Name	Required. Enter the name of the vendor from whom the asset was obtained. You can click the adjacent lookup  icon to search for this vendor using the Vendor Lookup form.
Manufacturer	Required. Enter the name of the company or person that manufactured the asset.
Model	Optional. Enter the manufacturer's model number for the asset.
Asset Description	Required. Enter a detailed description of the asset in this free-form text box.

Field Name or Control	Description
<input type="button" value="add"/>	Click the add button in the Action column to add the information you have entered for the new asset. Additional fields (described below in this table) will then be displayed so that you can enter identification and location details for the asset.
<input type="button" value="clear"/>	If you have not yet added the new asset information you entered in the fields described above, you can click the clear button if you want to clear those fields.
Tag Number	Optional; displayed after add button is clicked. Enter the unique identification number issued by the university and affixed to the asset.
Serial Number	Optional; displayed after add button is clicked. Enter the unique identification number assigned to the asset by the manufacturer.
Campus Code	Required; displayed after add button is clicked. From this drop-down list, select the code identifying the campus where the asset is physically located.
Building Code	Required; displayed after add button is clicked. Enter the code identifying the building where the asset is physically located. You can click the adjacent lookup  icon to search for this code using the Building Lookup form.
Room Number	Required; displayed after add button is clicked. Enter the room number of the room in the building where the asset is physically located. You can click the adjacent lookup  icon to search for this code using the Room Lookup form.
Sub Room	Optional; displayed after add button is clicked. If applicable, enter the sub-room number designating where the asset is located. You can click the adjacent lookup  icon to search for this code using the SubRoom Lookup form.
<input type="button" value="delete"/>	If you want to delete the new asset information you entered, click this button in the Action column, which is displayed after the add button is clicked.

General Ledger Pending Entries Tab

No action is required in this tab, which displays information entered via the **Accounting Lines** tab.



Seq #	Fiscal Year	Chart	Account Number	Sub-Account	Object	Sub-Object	Project	Doc Type	Balance Type	Obj. Type	Amount	D/C
1	2011	SC	9293212580	----	90208	---	-----	CR	AC	FB	293.00	C

Figure 31 – General Ledger Pending Entries tab

Notes and Attachments Tab

The **Notes and Attachments** tab displays user notes, attachments, or system-generated information about the document. The tab title (circled in *Figure 32*) is followed by a number in parentheses that represents the number of notes and/or attachments recorded. See page 48 for attachment size and file type restrictions, and page 49 for instructions on completing this tab.

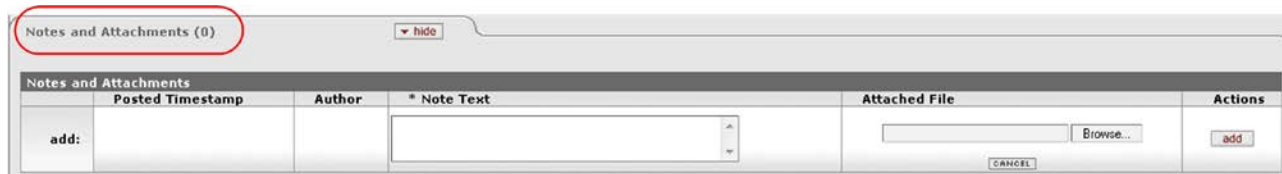


Figure 32 – General Notes and Attachments tab

It should be noted that the Procurement Card eDoc and the Procurement Card eStatement both feature a special **Transaction Notes and Attachments** tab in addition to the standard **Notes and Attachments** tab. The **Transaction Notes and Attachments** tab (see the example in *Figure 33*) enables users to attach receipts to individual transactions included in the Procurement Card eDoc or the Procurement Card eStatement.

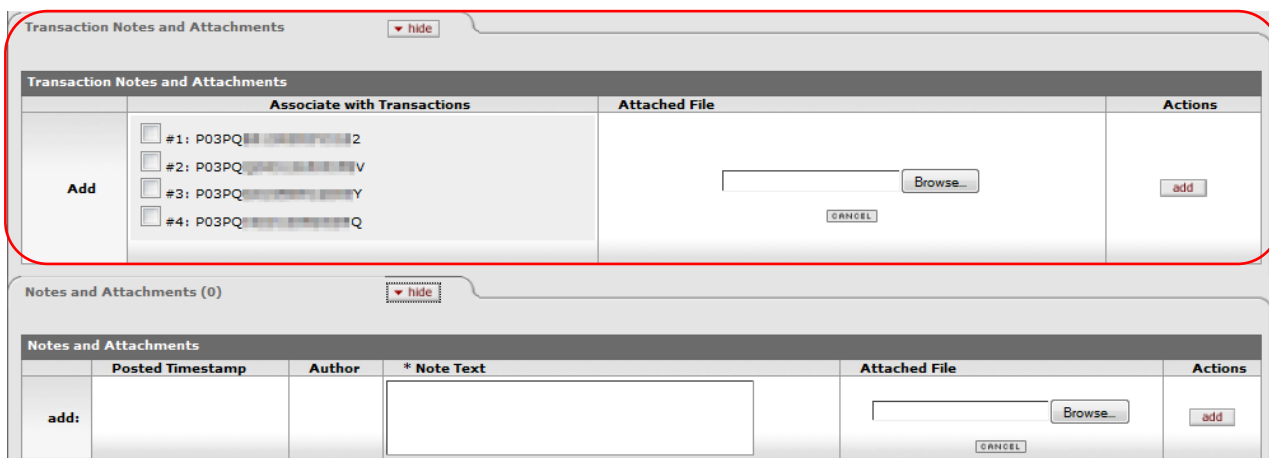


Figure 33 – Transaction Notes and Attachments tab

Table 9. Notes and Attachments Tab Fields and Controls

Field Name or Control	Description
Posted Timestamp	Display-only. Time and date when the attachment or note was posted.
Author	Display-only. Full name of the user who added notes or attachments.
Note Text	Required if you are attaching a file. Enter either notes or a description of the file that you are attaching to this eDoc.
Attached File	Optional. Select the file to attach by clicking Browse and using the standard Choose File dialog box. Click Cancel if you want to clear the file name you have selected.
add	Click add to insert your notes and/or attachment.

Size and File Type Restrictions for Attachments

Maximum file size for eDoc attachments: 40 MB

Allowable file types for eDoc attachments: An error message will be displayed if a user attempts to attach a document that is not among the file types supported in the Kuali system. *Table 10* lists all supported file types. However, bear in mind that when attaching files to specific kinds of eDocs, certain file types are preferred. For example, it is usually best to submit financial transaction eDocs with attachment files that cannot easily be changed (such as *.pdf*, *.png*, *.jpg*, *.tif*, or *.gif*).

NOTE: When scanning a document that you intend to attach to an eDoc, be sure to scan it in black & white with the resolution set to 300 dpi. Scanning documents in color and/or at a higher resolution will produce unnecessarily large files.

Table 10. File Types Supported for eDoc Attachments

<i>MIME Type</i>	<i>File Name Extension</i>
text/plain	.txt, .text
application/pdf	.pdf
application/msword	.doc, .dot, .w6w, .wiz, .word
image/jpeg	.jfif, .jfif-tbnl, .jpe, .jpeg, .jpg
image/pjpeg	.jfif, .jpe, .jpeg, .jpg
image/gif	.gif,
image/tiff	.tif, .tiff
image/xtiff	.tif, .tiff
application/mspowerpoint	.pot
application/x-mspowerpoint	.ppt
application/vnd.ms-powerpoint	.pot, .ppa, .pps, .ppt, .pwz
application/vnd.oasis.opendocument.text	.odt
application/x-vnd.oasis.opendocument.text	.odt
application/excel	.xl, .xla, .xlb, .xlc, .xld, .xlk, .xll, .xlm, .xls, .xlt, .xlv, .xlw
application/vnd.ms-excel	.xlb, .xlc, .xll, .xlm, .xls, .xlw
application/x-excel	.xla, .xlb, .xlc, .xld, .xlk, .xll, .xlm, .xls, .xlt, .xlv, .xlw
application/x-msexcel	.xla, .xls, .xlw

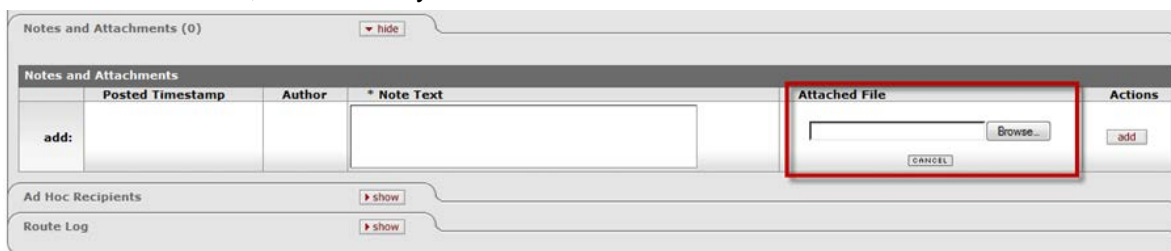
Completing the Notes and Attachments Tab

The following steps describe how to add notes or attachments on the **Notes and Attachments** tab.

1. Click the **show** button to reveal the fields and controls used for adding comments and attaching related files.



2. Type your comments in the text box labeled **Note Text**. Even if you are just attaching a file, you must enter the file name or a brief description of the attachment. (**Note Text** is a required field. You will not be able to add the attached file if this field is left blank.)
3. If you want to attach any documentation relevant to the eDoc, click the **Browse...** button next to the **Attached File** field and navigate to the location of the file on your computer that you want to attach to the eDoc. The full path of the file that you have selected will appear in the **Attached File** field, but it is not yet attached.



If you want to change your selection to a different file, click the small **CANCEL** button just below the Attached File field. When that field is empty again, click the **Browse...** button once more to locate the other file that you want to attach.

4. To save the notes you entered and the file that you have selected (if applicable), click the **add** button located to the right of the Attached File field, in the **Actions** column. (This button will not function if the **Note Text** field is empty.)

Ad Hoc Recipients Tab

The **Ad Hoc Recipients** tab (see *Figure 34*) enables an eDoc’s initiator, reviewers, and approvers to customize the workflow routing of the eDoc by adding specific individuals or groups in the Kuali system as reviewers or approvers. Defining the routing path of an eDoc to include specific individuals or groups is called “Ad Hoc routing.” The use of Ad Hoc routing is described in greater detail earlier in this guide (see *What is Ad Hoc Routing?* on page 2).

The **Ad Hoc Recipients** tab has two sections: Use the fields and controls in the **Person Requests** section when you want to route the eDoc to an individual so that he or she can approve or review it; use the fields and controls in the **Ad Hoc Group Requests** section when you want to route the eDoc to a group rather than to a particular user.

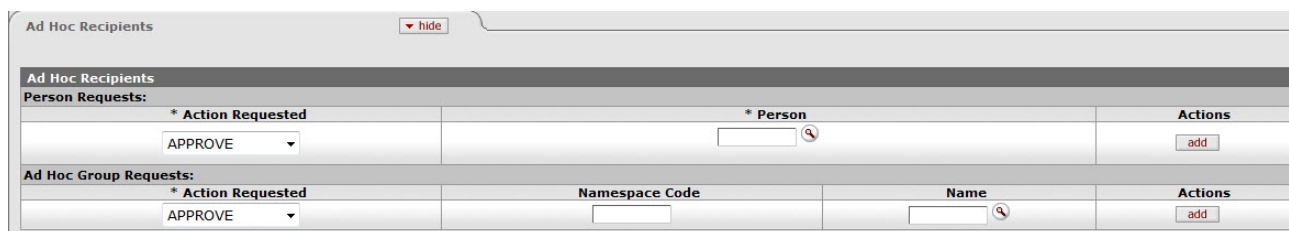






Figure 34 – Ad Hoc Recipients tab

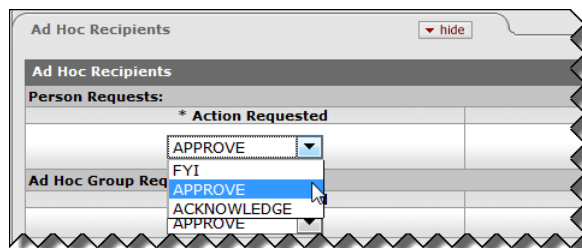
Table 11. Ad Hoc Recipients Tab Fields and Controls

Field Name or Control	Description
Action Requested	Required. Select the desired action from this drop-down list. The choices are <i>APPROVE</i> , <i>ACKNOWLEDGE</i> , and <i>FYI</i> .
Person	Required when routing the eDoc to an individual. Enter a User ID or click  to perform a UserID lookup.
Namespace Code Name	Required when routing the eDoc to a group. Enter the desired group’s Namespace Code and Name , or click  to perform a group lookup. If you perform a group lookup, you can click the Return Value link for the desired group when the search results are displayed on the Group Lookup page, and both the Namespace Code and Name fields will be populated automatically.
	Click the add button in the Actions column to add the information you have specified in the current line.
	After you have added a person or a group, the add button for that entry is replaced with a delete button in the Actions column. Click the delete button if you want to delete the current line.

Completing the Ad Hoc Recipients Tab

The following steps describe how to add an ad hoc recipient in the **Ad Hoc Recipients** tab.

1. Select the desired option from the **Action Requested** drop-down list (see the example to the right). To route the eDoc and your action request to an individual, make your selection in the **Person Requests** section. To route the eDoc and your action request to a group, make your selection in the **Ad Hoc Group Requests** section.

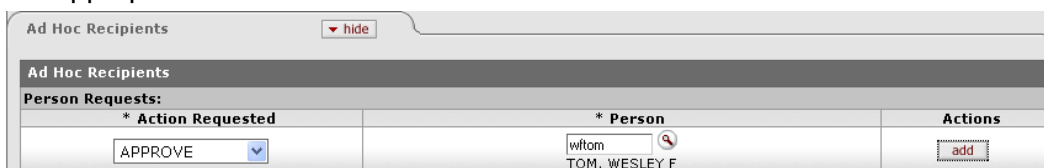



When selecting a requested action, be aware of the following factors:



- **Approve** – When you route an eDoc to someone with this action request, the recipient must open the eDoc and indicate whether it is acceptable by clicking the **approve** button. Sending an *Approve* request will interrupt the regular workflow routing process because (a) the eDoc will be routed to any Ad Hoc approvers before being sent on to any approvers included in the predefined workflow, and (b) the eDoc cannot progress to “Final” status until all requested approvals have been obtained.
- **Acknowledge** – When you route an eDoc to someone with this action request, he or she must open the eDoc and confirm receiving it by clicking the **acknowledge** button. The regular workflow routing process is not interrupted, but the eDoc cannot progress to “Final” status if the acknowledgment has not been obtained, even if the eDoc has received all needed approvals. Because of that routing restriction, it is usually wiser to select the *FYI* action request. You should only select the *Acknowledge* action request if you want to **require** the recipient to open the eDoc and review its details before it can continue through the workflow nodes.)
- **FYI** – This action request is a courtesy notification. When you route an eDoc to someone with an *FYI* request, the recipient can acknowledge it without even opening the eDoc in his or her action list. The regular workflow routing process is not interrupted, and the eDoc will progress to “Final” status once it has received all needed approvals and acknowledgments, regardless of whether the *FYI* request has been cleared.

NOTE: For some kinds of processes performed in Kuali, you may be required to select a particular action request (e.g., you should select only *FYI* for Ad Hoc routing of a Cashiering eDoc). Check with your supervisor if you are unsure about which type of action request to select.

2. If you are using Ad Hoc routing to send the eDoc to a person, type that individual’s User ID in the **Person** field in the **Person Requests** section, or click the lookup icon  to search for the appropriate User ID.



3. If you are using Ad Hoc routing to send the eDoc to a group, type the appropriate information for the desired group in the **Namespace Code** and **Name** fields in the **Ad Hoc Group Requests** section, or click the lookup icon  to search for the appropriate group name. (When you click the Return Value link for the desired group in the search results on the Group Lookup page, it will automatically populate both the Namespace Code and Name fields in the **Ad Hoc Recipients** tab.)

Ad Hoc Group Requests:			
* Action Requested	Namespace Code	Name	Actions
APPROVE 	<input type="text"/>	<input type="text"/> 	<input type="button" value="add"/>

4. Click the button. The system will verify that the User ID (or Group Namespace Code and Name) that you have entered for routing are valid.
5. Click the button.

Although the **Route Log** tab is discussed in the next section of this guide (see page 53), it is important to note here that after an eDoc's initiator (or an approver or reviewer) has completed the **Ad Hoc Recipients** section and submitted the eDoc, related changes will appear in the Route Log. If desired, you can use the information shown in the Route Log to confirm the Ad Hoc routing changes that you have made to the eDoc. For an explanation of how to do this, please see **Using the Route Log to Confirm Ad Hoc Routing Information** on page 55.

Ad Hoc Routing for "ENROUTE" eDocs

When an eDoc has ENROUTE status, you can send Ad Hoc requests without taking a workflow action on the document. To do this, perform a document search to locate and open the desired eDoc, and then follow the steps listed in **Completing the Ad Hoc Recipients Tab** (page 51), with one exception: Use the button that appears in place of the button at the bottom of the screen when you open an eDoc that has already been submitted.

Route Log Tab

Workflow routing information for each eDoc can be found in its **Route Log**. Most financial documents require one or more approvals before they impact the General Ledger. All Kuali users can view the Route Log of any eDoc.

As shown in *Figure 35* (below), the routing information is divided into four parts, on separate tabs:

- **Document ID** – Displays the eDoc’s system-assigned ID number plus basic information, such as the document’s name/description, document type, initiator, current status, creation date, and the dates when it was most recently modified, approved, and finalized. (See *Table 12*.)
- **Actions Taken** – Indicates past actions in the eDoc’s history, including the type of action, the name of the user who took the action (if the action was delegated on behalf of another user, the *Delegator* name is displayed), the time and date when the action was taken, and any routing annotation entered for the eDoc. (See *Table 13*.)
- **Pending Action Requests** – Indicates where the eDoc is currently located in the workflow by displaying the action requested, the user or users in whose Action List the eDoc awaits action, and the time and date when the eDoc went to their Action Lists, as well as any routing annotation entered by a user or the system itself. (See *Table 14*.)
- **Future Action Requests** – Indicates routing stops that the eDoc has yet to make. “Pending” means that the document is yet to be delivered to a user’s Action List. Thus, any user listed in the *Requested Of* column may not yet be aware of the eDoc. (See *Table 15*.)

ID: 382763

Title	General Journal Voucher - Test SPA Import		
Type	General Journal Voucher	Created	07:59 AM 08/11/2010
Initiator	Ronquillo, Edilberto A.	Last Modified	08:03 AM 08/11/2010
Status	ENROUTE	Last Approved	
Node(s)	FirstApproval	Finalized	

Actions Taken

Action	Taken By	For Delegator	Time/Date	Annotation
COMPLETED	Ronquillo, Edilberto A.		08:03 AM 08/11/2010	

Pending Action Requests

Action	Requested Of	Time/Date	Annotation
<input type="button" value="show"/> IN ACTION LIST APPROVE	Bloom, Marc	08:03 AM 08/11/2010	KFS-FP First GJV Approver

Future Action Requests

Action	Requested Of	Time/Date	Annotation
<input type="button" value="show"/> PENDING APPROVE	Martinez, Carmen Galang, Gina	09:50 AM 08/27/2010	KFS-FP Initial SPA Approvers
<input type="button" value="show"/> PENDING APPROVE	Lee, Cindy M.; Osuna, Robert D.	09:50 AM 08/27/2010	KFS-FP Final SPA Approvers
<input type="button" value="show"/> PENDING APPROVE	Nguyen, Si; Chang, Andrew	09:50 AM 08/27/2010	KFS-FP Initial Comptroller Office Approvers
<input type="button" value="show"/> PENDING APPROVE	Mitsuuchi, Karen; Stepanian, Peggy M.; Foster, Dennis M.	09:50 AM 08/27/2010	KFS-FP Final Comptroller Office Approvers

Figure 35 – The Route Log tab displays the workflow status and actions taken.

NOTE: When you review the **Route Log** immediately after submitting an eDoc, you may not see the **Pending Action Requests** tab. This is because Kuali has not yet received the routing information. In this case, wait for a few seconds and click the button near the top of the Route Log tab to update the screen. You may need to repeat this process a few times until the information appears in the **Pending Action Requests** tab.

Table 12. Fields on the Document ID Tab of the Route Log

<i>Field Name</i>	<i>Description</i>
Title	A combination of the eDoc's document type and its name/description.
Type	The eDoc's document type.
Initiator	Shows the creator of the eDoc. (<i>KFS</i> is shown for a system-created eDoc.)
Status	The current routing status of the eDoc.
Node(s)	The current route node (or "route level") of the eDoc; that is, the current step that the document is on, on its route path.
Created	The time and date when the eDoc was created.
Last Modified	The time and date when the eDoc was most recently modified.
Last Approved	The time and date of the most recent action taken on the eDoc.
Finalized	The time and date when the eDoc reached "FINAL" status.

Table 13. Fields on the Actions Taken Tab of the Route Log

<i>Field Name</i>	<i>Description</i>
Action	An action that has been taken on the eDoc.
Taken By	The Kuali user who took the action.
For Delegator	If the action was taken by one Kuali user acting on behalf of another user, this field shows the name of the user who delegated the responsibility for taking the action.
Time/Date	The time and date when the action was taken.
Annotation	This field shows any notes that have been added by the user or the system regarding the action that was taken.

Table 14. Fields on the Pending Action Requests Tab of the Route Log

<i>Field Name</i>	<i>Description</i>
Action	Indicates that the eDoc is currently in a user's or group's action list, awaiting the specified action.
Requested Of	The name of the user or group responsible for the pending action. The value in this field is based on the responsibility at the current route level. (If the eDoc has been routed to a role with more than five members, the name of

Field Name	Description
	the role will be displayed along with any qualifying values pertaining to the role assignees who received the action request.)
Time/Date	The time and date when the action request was sent.
Annotation	This field shows any notes that have been added by the user or the system regarding the action that was requested.

NOTE: The **Pending Action Requests** tab shows only action requests pending at the eDoc's current route level. The system may add new requests when the eDoc proceeds to a new route level.


Table 15. Fields on the Future Action Requests Tab of the Route Log

Field Name	Description
Action	An action request that is slated to be sent once all currently requested actions (shown in the Pending Action Requests tab) have been taken. "Pending Approve" means that an approval will be requested, but that action request has not yet been sent to the specified user.
Requested Of	The name of the user or group to whom the action request will be sent.
Time/Date	The time and date when this action request was added by the system to the queue of planned future actions for this eDoc.
Annotation	A system-generated note pertaining to the future action request.

NOTE: The **Future Action Requests** tab shows only scheduled action requests that have not yet been sent. As an eDoc proceeds along its route path and users take actions on it, the system will update the contents of this tab accordingly.

Using the Route Log to Confirm Ad Hoc Routing Information

If Ad Hoc routing is used with an eDoc, the **Route Log** tab will be updated by the system accordingly. (The **Ad Hoc Recipients** tab is discussed in detail earlier in this guide, starting on page 50.)

After an eDoc's initiator, approver, or reviewer has submitted or approved that eDoc with routing information specified in the **Ad Hoc Recipients** tab, the Route Log can be used to confirm the new routing instructions. To do this, ensure that the **Route Log** tab on the eDoc is expanded. (Click the  button on the Route Log tab, if necessary.)

- In the uppermost sub-tab of the Route Log, the *Status* value should now be "ENROUTE".
- The *Node(s)* value should be "Adhoc".
- The *Pending Action Requests* tab will show the User ID for each user to whom the eDoc has been routed, as well as the action that was requested.

The Route Log items described above are shown in the circled portions of *Figure 36*.

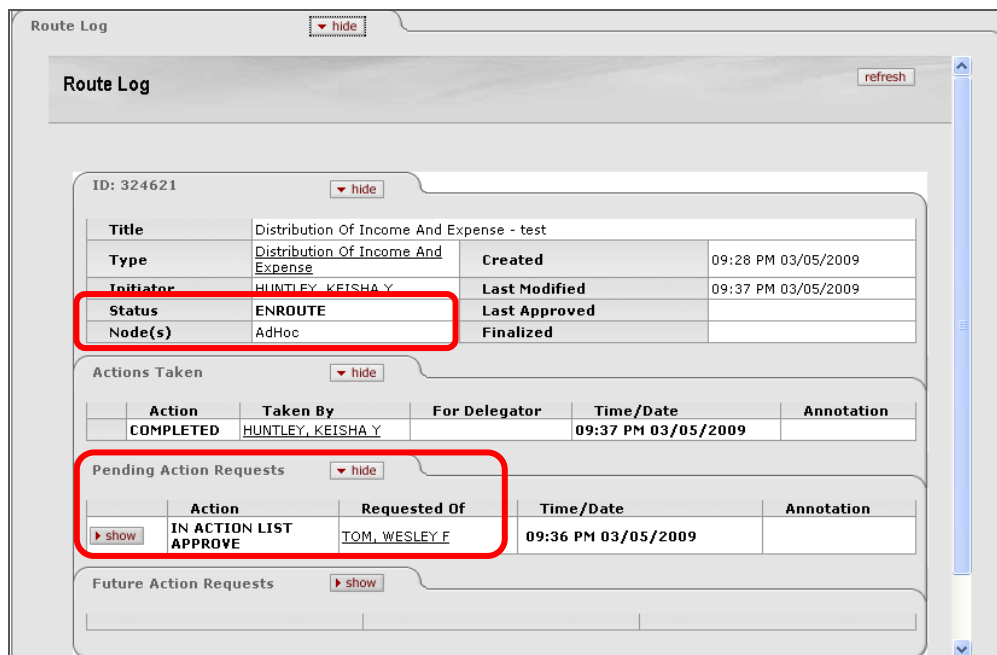


Figure 36 – Changes in the Route Log after an eDoc is sent with Ad Hoc recipients.

If applicable, the *Future Action Requests* tab will show any additional users to whom the eDoc will be routed later.

NOTE: For instructions on how you can view the Route Log of an eDoc for which you do not recall the Document ID number, see **Using Document Search to Check the Current Status** of an eDoc on page 21.

Additional Information

Creating a New eDoc by Copying an Existing One

The Kuali system permits authorized users to initiate a new eDoc based on a copy of one that already exists. This method of creating a new eDoc may be useful in those instances where an existing eDoc contains enough of the relevant data to be entered in the new eDoc that only a few minor changes or additions are needed.

Copying an existing eDoc will create a new eDoc of the same document type, with its own new Document ID number, but otherwise reproducing most of the same data entry details and settings contained in the original eDoc. Note, however, that any attachments in the original eDoc will not be copied to the new eDoc, and some details from the original eDoc may not appear in the new copy.

NOTE: Some eDocs cannot be copied to create a new eDoc of the same type. In those instances, the action buttons displayed at the bottom of the eDoc form will not include the **copy** button.

To create a new eDoc by copying an existing one, use the following procedure:

1. Use the **Doc Search** function in Kuali to find the existing eDoc that you want to copy. (See **Using Doc Search** on page 15 if you need instructions on searching for eDocs.)
2. In the list of search results, click the hyperlinked Document ID number of the desired eDoc. Your browser will then display the eDoc that you selected.
3. At the bottom of the displayed eDoc, click the **copy** action button. Your browser window will be refreshed to display a new eDoc of the same type as the original, with a new Document ID number in the document header in the upper right-hand corner of the eDoc screen. The document header will also contain a *Copied From* field that identifies the Document ID number of the original eDoc from which the new one was copied. (Additionally, a note identifying the original eDoc will appear in the **Notes and Attachments** folder tab.)
4. Just below the document header fields in the upper right-hand corner of the eDoc screen, click the **expand all** button to expand all of the folder tabs in the eDoc form.

NOTE: Most of the completed tabs from the original eDoc will be reproduced in the new eDoc, with the exclusion of any documents that were included as attachments in the original eDoc.
5. Carefully review all of the populated (i.e., not empty) tabs on the eDoc and remove any data in completed tabs that are not part of the new transaction request you are submitting.
6. Complete the tabs pertaining to the specific transaction request you want to submit. Be sure to change or delete any data or settings reproduced from the original eDoc that are not relevant to the new eDoc you are submitting. Because not all of the data from the original eDoc may have been reproduced in the copy, make certain that you have entered all of the details needed for the new transaction request.
7. When all relevant sections of the eDoc have been completed and you have deleted data from the original eDoc in all unrelated tabs, click the **submit** button at the bottom of the eDoc screen.