Kuali Financial System
Account Supervisor Instructions

The new UH financial system - Kuali Financial System (KFS) – went live on July 2, 2012. KFS replaced the previous Financial Management Information System (FMIS) used by UH since 1996. KFS was developed by a group of higher education institutions, including UH, with similar financial processing and reporting needs.

Document processing in KFS is performed on-line. Deans, Directors, Department Chairs, faculty and other UH personnel with oversight over expenditures will use the KFS website to review and approve expenditures on the accounts for which they are responsible. This role is known as the Account Supervisor in KFS, and is the same as the Approving Authority (Principal Investigator) role in FMIS. Account Supervisor approval of a document indicates that the expenditure supports the program indicated by the account code used on the document.

Documents awaiting your approval will be found in your Action List. This process and the underlying workflow will be familiar to those of you now using the on-line Leave System and/or myGRANT. The following steps summarize the process of reviewing and approving documents in KFS:

- Access the KFS website: kfs.hawaii.edu
- Click on Main Menu
- Log in using your UH user name and password
- Click on Action List
- Click on document number in “Id” column to open a document
- Review document
  - Each document has multiple tabs; click on “show” to view information if tabs are closed
  - “Notes and Attachments” tab can be used to provide additional information
- Click on Approve or Disapprove at bottom of document

Interactive on-line tutorials demonstrating how to use the system are available in the Training section of the UH KFS website, at the following link:

http://www.hawaii.edu/kualifinancial/?page=documentApprover&showSubMenu=training

Most of the on-line tutorials take only a few minutes to review. The following tutorials are particularly recommended for Account Supervisors:

- KFS Fundamentals: Logging In and Out of KFS
- Document Approver: Action List Management and Configuration
  - Acting on Items in Your Action List
  - Adding Notes and Attachments
  - Retrieving Notes and Attachments

Note: eTravel will continue to be used to prepare travel advances and completions.