



Critical Data in KFS training

FINANCIAL MANAGEMENT SERVICES

What is Critical Data?

Critical data is any information that, if inappropriately handled, could result in criminal or civil penalties, identity theft, personal financial loss, invasion of privacy, and/or unauthorized access to this type of information by an individual or many individuals.



Background

- October 2015: W-9 (with SSN) found in KFS.
- Escalated to:
 - KFS Technical Team
 - University Information Policy Office
 - Financial Management Services
- Locked down Notes and Attachments for 4 weeks.
- Audit removed ~600 pieces of critical data.



Critical Data in KFS

- Goal: to help users identify where critical data does and does not belong in KFS.
- 30-minute online training.
- Available in Canvas 24/7.
- Self-enroll via E Training in IU Expand.



Who needs to take the training?

- New KFS users.
- Current KFS users.

A KFS user is someone who can:

- View, initiate, and submit most Financial Processing documents,
- Conduct General Ledger and Labor Balance Inquiries,
- And more.



Financial Processing

ACTIVITIES

Advance Deposit
Auxiliary Voucher
Cash Receipt
Disbursement Voucher
Distribution Of Income And Expense
General Error Correction
Indirect Cost Adjustment
Internal Billing
Non-Check Disbursement
Pre-Encumbrance
Transfer Of Funds

REFERENCE

GL - Available Balances
GL - Balances by Consolidation
GL - Cash Balances
GL - General Ledger Balance
GL - General Ledger Entry
GL - General Ledger Pending Entry
GL - Open Encumbrances

ADMINISTRATION

Cash Drawer
Credit Card Type

Credit Card Vendor
Disbursement Voucher Payment Reason
Disbursement Voucher Tax Income Class
Disbursement Voucher Travel Company
Disbursement Voucher Travel Expense Type
Disbursement Voucher Travel Mileage Rate
Disbursement Voucher Travel Per Diem
Non-Resident Alien Tax Percent
Procurement Cardholder Defaults



Training Outline

- 4 videos and 4 quizzes.
- Read and sign the Acceptable Use Agreement.
- Final Assessment.
- Certificate of Completion.



Implementation Timeline

- **Monday, December 4, 2017**
 - All new KFS users must have completed *Critical Data in KFS* before their department requests KFS access on their behalf.
 - The *Critical Data in KFS* training will be open to all existing KFS users.

- **Monday, March 5, 2018**
 - All existing KFS users who have not completed the training will have their KFS access revoked.



Annual Recertification

- All KFS users will be required to complete the *Critical Data in KFS* training on an annual basis.
- Users will receive as many as three reminders before their certification expires.
- FMS staff will revoke KFS access from users whose certification is expired.





Financial Management Services Training

- Training
- Course Catalogs
- KFS/ IU Financial Services Reference Guides
- DV Certification
- Critical Data in KFS
- KFS Training Environment
- Payroll Training
- Regional Training
- University Finance Fundamentals
- Kuali Financial System
- IUIE Documentation
- Listservs
- Training Facility

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Critical Data in KFS Training

In light of the ever-increasing challenges to face in the area of appropriate securing of institutional and personal data, Financial Management Services (FMS) staff is committed to preventing the inappropriate disclosure of critical data through the Kuali Financial System (KFS).

Critical data inappropriately entered in KFS places the identities and finances of IU students, employees, and vendors at risk. Furthermore, critical data inappropriately entered in KFS exposes IU to financial loss, legal liability, and reputational harm. Although it is possible to scrub critical data from unsecure fields in KFS, there is no guarantee that FMS staff can quickly identify and remove every instance of unprotected critical data in KFS.

As a result, FMS leadership is determined to mitigate cyber risks and administrative overhead associated with critical data exposure by providing all KFS users with mandatory training about critical data and where it does and does not belong in KFS. **Therefore, as of Monday, December 4, 2017, FMS will require all KFS users to complete the 30-minute online training, *Critical Data in KFS*.**

Timeline

New KFS Users

Beginning **Monday, December 4, 2017**, completion of the *Critical Data in KFS* training will be required of all new KFS users. FMS staff will not provision KFS access for new KFS users until they have successfully completed the training. Please note that reading and signing the Acceptable Use Agreement is included in the *Critical Data in KFS* training; new KFS users who complete the training will also fulfill the Acceptable Use Agreement requirement.

fms.iu.edu/training



Contact

Steve Miller

- Director of Payroll Operations, Customer Service, and FMS Training
- stgmill@iu.edu

Elisabeth Mason

- Senior Training and Documentation Specialist
- elimason@iu.edu



Questions?

