



Critical Data in KFS training

FINANCIAL MANAGEMENT SERVICES

Purpose of critical data training

- One of many safeguards designed to protect:
 - Finances and identities of IU students, employees, and vendors.
 - Finances and reputation of Indiana University.
- Goal: to help users identify where critical data does and does not belong in KFS.



To whom does this training apply?

- New KFS users.
- Current KFS users.



New KFS users

- New users must complete the training **before** the System User Role document is submitted.
- About 2/3 of all new users have **not** completed the training when the access request is made.
- Recommended steps:
 - New KFS user completes training and sends you their Certificate of Completion.
 - Attach the user's certificate to the System User Role document.



Current KFS users

All KFS users who have not completed the training by **Monday, March 5, 2018** will lose their KFS access.

Population	Count	Percentage
KFS users who have completed the training	2,156	56%
KFS users who have not completed the training	1,685	44%
Non-KFS users who completed the training	158	--



Frequently Asked Questions

1. I completed the training. There must be an error with your records. Can you double-check?
2. Do I really need KFS access?
3. I'm not a KFS user. Why are you contacting me about KFS?
4. I no longer use KFS. Can you please revoke my KFS access?



“I already completed the training.”

- Training consists of:
 - 4 short quizzes.
 - Acceptable Use Agreement attestation.
 - 20-question final assessment.
- If you haven't gotten to the Certificate of Completion, you haven't completed the training.



“Do I really need KFS access?”

- A better question for a business or fiscal officer.
- All IU employees have access to:
 - Shop Catalogs.
 - Requisitions (PREQs).
 - Travel Expense Module (TEM).
- KFS users can also:
 - Initiate and submit most Financial Processing documents.
 - Conduct General Ledger and Labor Balance Inquiries.



“I’m not a KFS user.”

- Many of these employees used KFS in a previous position.
- When an employee moves on:
 - The new department can update their KFS org affiliation, or
 - The original department can revoke their KFS access.




“Can you revoke my KFS access?”

- I cannot initiate the process to remove someone's KFS access.
- Typically, someone in the employee's department should initiate a System User Role document.
- Or, ignore reminders about the new KFS training and let your KFS access "lapse" on March 5.



System User Role Lookup ?

* required field

* Principal Name:	<input type="text" value="ajbruce"/> 
	Bruce, Andrew Joseph
KFS User?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Journal Voucher User?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Labor Journal Voucher User?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Blanket Approver?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	

<u>Actions</u>	<u>Principal ID</u>	<u>Principal Name</u>	<u>Chart Code</u>	<u>Organization Code</u>	<u>KFS User?</u>
edit	0001481898	ajbruce	UA	FMOP	Yes

One item found.1

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



Document Overview

hide

Document Overview

* Description:	Remove KFS access for Andy Bruce	Explanation:	
Organization Document Number:			

Person

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Old		New	
Principal Name:	ajbruce - ajbruce	Principal Name:	ajbruce - ajbruce
Chart Code:	UA - UNIV ADMIN	Chart Code:	UA - UNIV ADMIN
Organization Code:	FMOP	Organization Code:	FMOP
KFS User?:	Yes	* KFS User?:	<input checked="" type="checkbox"/>

Role Assignments

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Old		New	
Journal Voucher User?:	No	Journal Voucher User?:	<input type="checkbox"/>
Labor Journal Voucher User?:	No	Labor Journal Voucher User?:	<input type="checkbox"/>
Blanket Approver?:	No	Blanket Approver?:	<input type="checkbox"/>

Additional information

- Online info session:
 - Wednesday, February 7.
 - 10-10:30 a.m.
 - <http://go.iu.edu/fms>
- FMS website: fms.iu.edu/training
 - Training details.
 - Enrollment instructions.
- Email: fmstrain@indiana.edu



Questions?

