

# Chart of Accounts System User Role

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## Overview

The “System User Role” document is used to add new users to IU KFS or terminate user access. It is also used to modify existing user’s access. The document can be initiated by any IU user, and routes to an IU KFS user group for final approval. It can be found in the “Chart of Accounts” module of the “KFS Modules” tab.

## Accessing the User Role Document

To access the System User Role document, you must first do a lookup for the user. Under the “Chart of Accounts” module in KFS, you will only have ability to do a System User Role lookup:


System User Role Lookup ?		* required field
* Principal Name:	<input type="text"/>	<input type="button" value="Search"/>
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"/>		

Enter the principal name of the individual that you need to add, update, or remove and search to see their current status:



## System User Role Lookup

\* required field

<b>* Principal Name:</b>	<input type="text" value="mbyrde"/>  Byrde, Mary M.
<b>KFS User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Labor Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Blanket Approver?:</b>	<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"/>	

Actions	Principal ID	Principal Name	Chart Code	Organization Code	KFS User?
<a href="#">edit</a>	0000476696	mbyrde	UA	FMOP	Yes

One item found. **1**

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

Once you have identified the correct principal name, click the **edit** link in the corresponding row to access the System User Role document.



## Document Layout

<b>System User Role</b> ?		<b>Doc Nbr:</b> 30881584	<b>Status:</b> INITIATED
		<b>Initiator:</b> bbrckalo	<b>Created:</b> 09:24 AM 08/26/2014

\* required field

**Document Overview**

<b>Document Overview</b>	
<b>* Description:</b>	<input type="text"/>
<b>Organization Document Number:</b>	<input type="text"/>
<b>Explanation:</b>	<input type="text"/>

**Person**

Old	New
<b>Principal Name:</b> mbyrde_ - mbyrde	<b>Principal Name:</b> mbyrde_ - mbyrde
<b>Chart Code:</b> UA - UNIV ADMIN	<b>Chart Code:</b> UA - UNIV ADMIN <input type="button" value="v"/> <input type="button" value="m"/>
<b>Organization Code:</b> FMOP	<b>Organization Code:</b> FMOP <input type="button" value="m"/>
<b>KFS User?:</b> Yes	<b>* KFS User?:</b> <input checked="" type="checkbox"/>

**Role Assignments**

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

**Notes and Attachments (0)**

**Ad Hoc Recipients**

**Route Log**

### Person Tab

The “Person” tab is unique to the User Role document and enables the initiator to specify whether or not the person should be an active KFS user. Active users will have the “KFS User?” box checked.

**Person**

Old	New
<b>Principal Name:</b> mbyrde_ - mbyrde	<b>Principal Name:</b> mbyrde_ - mbyrde
<b>Chart Code:</b> UA - UNIV ADMIN	<b>Chart Code:</b> UA - UNIV ADMIN <input type="button" value="v"/> <input type="button" value="m"/>
<b>Organization Code:</b> FMOP	<b>Organization Code:</b> FMOP <input type="button" value="m"/>
<b>KFS User?:</b> Yes	<b>* KFS User?:</b> <input checked="" type="checkbox"/>

### Role Assignments Tab

The “Role Assignments” tab is unique to the User Role document and enables the initiator to specify what type of IU KFS access the user should have. Additional access is requested by selecting the available boxes labeled “Journal Voucher User,” “Labor Journal Voucher User,” “Blanket Approver.” Special approval from FMS must be obtained before access to Journal Vouchers, Labor Journal Vouchers and Blanket Approver roles will be granted.



Role Assignments		▼ hide	
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"/>

## Process Overview





### Business Rules

- Any current FIS user can initiate a User Role document.
- User Role document routes to FMS User Group for final review and approval.
- Once approved, the new user has immediate access to IU KFS.

### Routing


After a User Role document is submitted, it routes to the employee's fiscal officer, unless the Fiscal Officer submitted the document in the first place. The document then might go through an organization hierarchy review. It then routes to the FMS User Workgroup. Once the document is fully approved, the new user is able to access IU KFS immediately.

## Initiating a User Role Document


1. Log into One.IU as necessary.
2. Search for "All Financial Services" and click **All Financial Services** tile in the search results. Under "Chart of Accounts" module, select **System User Role Lookup** .
3. The User Role Lookup screen appears.
4. Enter the network ID of the person to be added. Otherwise, click the magnifying glass to lookup the user.
5. Click **search** .
6. Select the person you would like to edit by clicking the **edit**  button.
7. Click the radio buttons for the type of access you would like the new user to have.
8. Click **submit** .

## Example

A new user needs to be added to KFS. Click the create button to open the System User Role document. Enter the network ID of the person you would like to add and click search.

**System User Role Lookup** 

\* required field

<b>* Principal Name:</b>	<input type="text"/> 
<b>KFS User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Labor Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Blanket Approver?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both



Click “edit” to add a new user or modify the access of a current user. If the new user is an affiliate, an affiliate indicator will appear.

**System User Role Lookup** \* required field

<b>* Principal Name:</b>	jkbruner
	Bruner, Janette Kay
<b>KFS User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Labor Journal Voucher User?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
<b>Blanket Approver?:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both

Actions	Principal ID	Principal Name	Chart Code	Organization Code	KFS User?
<a href="#">edit</a>	0001775435	jkbruner			No

One item found.1  
 Export options: [CSV](#) | [Excel](#) | [XML](#)

Click the **KFS user** checkbox to request that they be activated and select those functions you would like the new user to be able to perform. In most cases, new users will only require the KFS User role as shown below.

**System User Role** \* required field

Doc Nbr: 30891708      Status: INITIATED  
 Initiator: bbrckalo      Created: 03:59 PM 12/05/2014

**Document Overview** hide

<b>* Description:</b>	Bruner, Janette New User	<b>Explanation:</b>
<b>Organization Document Number:</b>		

**Person** hide

Old	New
<b>Principal Name:</b> jkbruner - jkbruner	<b>Principal Name:</b> jkbruner - jkbruner
<b>Chart Code:</b>	<b>Chart Code:</b> BA - BLOOMINGTON AUX
<b>Organization Code:</b>	<b>Organization Code:</b> RPA
<b>KFS User?:</b> No	<b>* KFS User?:</b> <input checked="" type="checkbox"/>

**Role Assignments** hide

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

Notes and Attachments (0) show

Ad Hoc Recipients show

Route Log show



Click **submit**  .

