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Resources

The FMO website has a Financial Systems page at [http://www.fmo.hawaii.edu/financial_systems/index.html](http://www.fmo.hawaii.edu/financial_systems/index.html) that focuses on specific material related to the systems with the following dedicated tabs Overview, FAQs, Contact Us, Policies and Guidelines, Forms and Training.

Click on [http://www.fmo.hawaii.edu/financial_systems/index.html](http://www.fmo.hawaii.edu/financial_systems/index.html) for access to our webpage and then click on the pertinent tab for assistance with your topic of interest. The screenshot below shows the layout of the website. A description of the tabs is provided beneath the screenshot.

### Overview:
This tab provides you with a brief overview and live links to KFS or eThority. Just click on the respective logo to begin the log in process.

### FAQs:
This tab provides frequently asked questions by topic.

### Contact Us:
In the event you need to contact a member of the Kuali Financial Project team you can view their name, area of responsibility, phone number, and a live link to their email address. The Contact Us tab also provides the live link to submit a trouble ticket: Submit a Trouble Ticket.

### Policies and Guidelines:
You can review the Process Documents for each business process to get a finer level of details related to each topic.

### Forms:
This tab provides you with links to forms related to KFS access used by UH employees.

### Training:
The KFS Training Team has developed training manuals and On-Line tutorials for KFS. There are training manuals for each of the sessions as well as On-Line tutorials for each topic within the session(s). If you want to attend in-person training refer to the Training Calendar found on the “Training Calendars & Other Schedules” tab on the FMO Website homepage. Additionally, notification of upcoming training is sent to the KFS-USERS listserv. Register for training by clicking on the registration links provided. There are also Tips of the Week for commonly asked questions.

Each of the Service Areas within the FMO website has similar tabs related to the specific areas. For example, for forms related to payments and reimbursements, go to the Forms tab of the Payment/Reimbursement page.
Objectives

- Action List Preferences
- Action List Tasks (FYI, Approve, Disapprove, and Acknowledge)
- Reviewing and Attaching Notes and Attachments
- Reviewing the Route Log
Action List Preferences

Process

The Action List can be configured for each individual user. This tutorial covers ways to customize your action list by setting your action list preferences.

Navigation: action list

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the “action list” button.</td>
</tr>
</tbody>
</table>

**Note:** The action list button can be accessed from any menu tab or within each eDoc.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td><strong>The “Action List” displays Id, Type, Title, Route Status, Action Requested, Initiator, Delegator, Date Created, and Actions fields.</strong></td>
</tr>
</tbody>
</table>

The **Id** is the document number and is an active link, that when clicked, opens the eDoc.

The **Route Status** provides information about the current status of the document.

- **ENROUTE** – the document is still pending approvals
- **SAVED** - the document has not been submitted
- **DISAPPROVED** - the document has been disapproved by an approver after the document was submitted
- **PROCESSED** - the document was blanket approved
- **FINAL** - the document does not have pending actions
- **EXCEPTION** - the document had a system error during processing
Step # | Procedure
--- | ---
3. | The **Action Requested** field provides information about the action you must perform on the document.

**ACKNOWLEDGE** - The document requires you to open the eDoc and acknowledge that you have reviewed the eDoc before it can be removed from your action list. An action of **Acknowledge** does not stop the eDoc from moving through the workflow approval process.

**APPROVE** - The document requires you to open the eDoc and either approve or disapprove the eDoc before it can be removed from your action list. An action of **Approve** prevents the eDoc from moving through the workflow approval process until you take action.

**COMPLETE** – A document that you initiated and saved but have not yet submitted will remain in your action list until the action of **Complete** (eDoc submitted) has been taken, and therefore the eDoc has not routed anywhere.

**FYI** - The document requires you to either open the eDoc and take action by clicking the **fyi** button at the bottom of the eDoc, or select the **FYI** option from the **Actions** column on the **action list** page and then click the **take action** button to remove the eDoc from your action list without opening the eDoc for review. An action of **FYI** does not stop the eDoc from moving through the workflow approval process.

**Note:** The **Actions** column is only available on the **action list** page if the Clear FYI checkbox is checked in your action list **preferences**. The checkbox is located in the **Fields Displayed in Action List** section of the **Workflow Preferences** page.
Step # | Procedure
---|---
4. | Click the “preferences” button to configure your Action List.

5. | The General data box provides options to control your action list.

6. | The “Automatic Refresh Rate” field determines how often your action list will be automatically refreshed in whole minutes.

   **Caution:** A time of 0 is for no automatic refresh. If you choose 0 you must refresh your action list manually by clicking the refresh button on the action list page.

7. | The Action List Page Size field determines the maximum number of rows that display on each page of your action list.

8. | The Email Notification field allows you to control if and how often you would like to receive email notifications for new documents in your action list.

   Click the “Email Notification” drop-down list box.
### Step # Procedure

**9.** The email notification choices are:

- **None** - Select if you intend to be in KFS on a regular basis and do not need reminders.
- **Daily** - Select if you want an email notification only once a day at 6:00am.
- **Weekly** - Select if you want an email notification only once a week on Sundays at 6:00 am.
- **Immediate** - Select if want an email notification every time your action list is updated.

**Note:** The default selection is **Immediate**.

For this example select **daily** from the drop down selections.

**Note:** Please refer to Appendix A and B for sample emails of each option.

**10.** The **General** data box also provides options to control your email and action list filters as a **Delegate / Delegator**:

The **Receive Primary Delegate Emails** field allows you to control whether or not to receive email notifications of **action list** items routed to you as a **Primary Delegate**.

The **Receive Secondary Delegate Emails** field allows you to control whether or not to receive email notifications of **action list** items routed to you as a **Secondary Delegate**.
The **Delegator Filter** field is used by **Secondary Delegates** to select whether action list items for which they are a **Delegate** will display on his/her action list page amongst their own items, or use the filter option to search for the delegate action items.

**Secondary Delegators on Action List Page** – This is the default selection. This selection will provide a drop-down list box on the action list page, but it is only available when there are eDocs pending action as a **Secondary Delegate**.

- **“Choose Secondary Delegation”** option – clears the action list and shows only those things that have routed directly to you for approval.
- **“All”** option - shows only those items that you are listed as the Secondary Delegate, excludes any primary delegations.
- **“Specific name”** option – shows all the docs that you could take action on for this person as either the secondary or primary.

**Secondary Delegators only on Filter Page** – When this option is selected the **Secondary Delegate** will use the filter button (located on the main action list page) to search for eDocs pending action as a **Secondary Delegate**.
### Step # 12. Procedure

The **Primary Delegate Filter** field is used by **Fiscal Administrators** to select whether their **Primary Delegates** are available in a drop-down list box on their **action list** page, or to use the filter option to search for their delegates’ action items.

**Primary Delegates on Action List Page** – This is the default selection. This selection will provide a drop-down list box on the **action list** page, but it is only available when there are eDocs pending action for the Fiscal Administrators **Primary Delegate(s)**. The drop-down list options are:

- **“Choose Primary Delegation”** option – clears the **action list** and shows only those eDocs that have routed directly to the Fiscal Administrator.
- **“All”** option -shows all the eDocs routed to their **Primary Delegates**.
- **“Specific name”** option – shows all the eDocs that are in this **Primary Delegates action list** as the delegate.
### Step # 13

**Procedure**

The **Fields Displayed in Action List** data box lists all the columns that are available to display on your **action list**. To remove or add a column, click on the related "Check Box" to add or remove the check. A check in the box will display the column on your **action list**.

![Fields Displayed in Action List](image)

Columns that can be displayed in your action list

A check mark indicates your preference to display the column

### Step # 14

**Procedure**

The **Document Route Status Colors for Action List Entries** data box provides the option to color code the items in your **action list** by the **Document Route Status**.

![Document Route Status Colors](image)

Select a radio button beside the route status to color code the items in your action list.

### Step # 15

**Procedure**

Click the "save" button to save any preference default setting changes.
16. You can sort the action list by clicking on any of the headings in the table that are underlined. For example, click on the “Action Requested” heading to sort all your documents by the Action Requested.

17. The Action Requested field is sorted alphabetically in the Action List.
Acting on Items in Your Action List

Acknowledge a Document and add Ad Hoc Recipients

In this process you will **ACKNOWLEDGE** a document in your **action list** and add an **FYI Ad Hoc Recipient** to the document.

![Action List](image)

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td><strong>Note:</strong> If you would like to work through your action list by reviewing older documents first you could simply click the <strong>Date Created</strong> link and work your way down the list. The <strong>Date Created</strong> is not necessarily the date the document was added to your <strong>action list</strong>. It represents the date the document was created by the user.</td>
</tr>
<tr>
<td>19.</td>
<td>A document with the <strong>Route Status</strong> of <strong>DISAPPROVED</strong> means that someone disapproved a document that you created. A <strong>Disapproved</strong> eDoc requires an action of <strong>acknowledge</strong> by the initiator. Click the doc “Id” for the <strong>Disapproved</strong> eDoc to review and <strong>acknowledge</strong> the eDoc and remove the document from your <strong>action list</strong>. In this example we will click on a document that was <strong>DISAPPROVED</strong>, review the reason for the disapproval and send an <strong>FYI</strong> to another user prior to taking the action of <strong>acknowledge</strong>.</td>
</tr>
</tbody>
</table>
Step # | Procedure
--- | ---
20. | Review the document for accuracy. After reviewing the document you will take action on it. The action buttons are at the bottom of the page.

In this example we can open the Notes and Attachments tab to view the reason for the disapproval.

Note: The reason for the disapproval is also found in the Route Log.

21. | KFS includes an electronic routing process called Workflow. The Route Log tab allows you to view the workflow routing.

22. | Click the “show” button on the Route Log tab.
23. The Route Log tab displays information about the documents workflow status. The Route Log is like a map of where the document started (ID tab), where it has been (Actions Taken tab) and where it is going (Pending and Future Actions tabs).

Note: The Route Log tab is explained further in the Reviewing the Route Log tutorial on page 36 of this manual.

24. The Ad Hoc Recipients tab allows you to enter individuals or groups into the workflow that is not part of the original workflow.

25. Click the “show” button on the Ad Hoc Recipients tab.
Step # | Procedure
--- | ---
26. | The *Action Requested* field has 2 options since the document in your **Action List** is to **ACKNOWLEDGE**. However, if the document was in your **Action List** to **APPROVE** there would also be an option to route the document to someone else for another approval prior to you approving the document.

**Note:** To route for an additional approval you must ad hoc route the eDoc before you approve the document. The option to route for another approval is not available after you approve the document.
### Step # | Procedure
--- | ---
27. | In this scenario you will send an FYI to TRAIN002. Select the “FYI” option from the Action Requested field drop-down.
28. | Click in the “*Person*” field and enter the ID of the person who should get the FYI and then press the Tab key on your keyboard to refresh the page and view the name associated to the ID entered. If you do not know the ID; click the magnifying glass to conduct a search for the Person / ID.
In this scenario you will enter “TRAIN002” in the Person field.
29. | Click the “add” button.
30. | You are now ready to ACKNOWLEDGE your document.
Click the “acknowledge” button at the bottom of the document.
When you acknowledge the document, the system will also send the ad hoc FYI action.
**Note:** If you want to send an ad hoc request without taking your requested action, add the ad hoc recipient and click the “send ad hoc request” button. The document will remain in your Action List until you complete your requested action.
### Step # Procedure

31. The document will no longer appear in your Action List.
Approve a Document and View Notes and Attachments

In this process you will **APPROVE** a document and retrieve the **notes and attachments** on KFS documents that are in your **Action List**.

**Note:** Any document that has a note or an attachment can be viewed at any time. For example, you may search for the document and open the **Notes and Attachments** tab at any time. The document does not need to be in your **Action List**. However, due to the sensitivity of the attachments on the Vendor Maintenance (PVEN) document, these attachments are hidden and can only be viewed by Disbursing.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.</td>
<td>Click the document “ID” that requires the action of <strong>Approve</strong> to open the document.</td>
</tr>
<tr>
<td>33.</td>
<td>Review the document for accuracy.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>34.</td>
<td>If there are notes and/or attachments on the document there will be a number on the right of the <strong>Notes and Attachments</strong> tab. For this scenario, the (2) means there are two notes and/or files attached to the document. Click the “<strong>show</strong>” button on the <strong>Notes and Attachments (1)</strong> tab.</td>
</tr>
</tbody>
</table>
Step #    Procedure
35.    The first item is a note and attachment. The **Posted Timestamp**, **Author**, and **Note Text** are displayed for the note, and the **Attached File** is displayed for the attachment.

The second item is a note. The **Posted Timestamp**, **Author**, and **Note Text** are displayed.

**Note**: You can attach a file or note in addition to the existing notes and/or attachments at any time during the document routing. The system requires a note when a file is attached.

36.    To view the attached file, click the “paperclip” icon next to the desired file.

37.    Click the “OK” button to open the file in the selected format. In this scenario the file is an Adobe pdf file.

38.    The file opens for viewing.

39.    Review the attachment as necessary.

40.    Click the “X” on the top right corner to close the attached document.
### Step #41

**Procedure**  
You are now ready to **APPROVE** your document.

**Note:** If you wish to route this document for an approval that is not in the workflow, you will need to **ad hoc** route it prior to approving the document.

Click the “**approve**” button at the bottom of the eDoc.

### Step #42

**Procedure**  
The document will no longer appear in your **Action List**.
Disapprove a Document and Add Notes and Attachments

This process will review the steps on how to DISAPPROVE a document that is in your Action List with an Action Requested of APPROVE. When a document is in your Action List for an approval, you have the option to also DISAPPROVE the document once inside the eDoc. Disapproving a document will return the eDoc to the initiator. A disapprove action will send an ACKNOWLEDGE action to the Initiator, and any user who already approved the document.

This process will also review the steps on how to add Notes and Attachments to a document. Notes and/or Attachments can be added on the Notes and Attachments tab by anyone and at anytime. The initiator can add them when they are creating the document. The approver can add them when they are approving or disapproving the document.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>43.</td>
<td>Click the document “ID” link to open the document that requires the action of Approve.</td>
</tr>
<tr>
<td>44.</td>
<td>Review the document for accuracy.</td>
</tr>
</tbody>
</table>
Step # | Procedure
---|---
45. | In this tutorial you will attach a note and an attachment to a KFS document that is pending an approval prior to disapproving the document.

46. | Click the “show” button on the **Notes and Attachments** tab. **Note:** There are no current attachments or notes on the document. This is depicted by the **(0)** on the **Notes and Attachments** tab.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>47.</td>
<td>The <strong>Note Text</strong> field in the <strong>Notes and Attachments</strong> tab is only required if an attachment is added. Click in the <strong>Note Text</strong> field.</td>
</tr>
<tr>
<td>48.</td>
<td>Enter <strong>&quot;Please order 2 more for the lab.&quot;</strong> in the <strong>Note Text</strong> field.</td>
</tr>
<tr>
<td>49.</td>
<td>Click the <strong>&quot;add&quot;</strong> button under the <strong>Actions</strong> field. <strong>Note:</strong> If you are adding an attachment with the note you would attach the file before you click on the <strong>&quot;add&quot;</strong> button under the <strong>Actions</strong> field.</td>
</tr>
</tbody>
</table>
Step # | Procedure
--- | ---
50. | The Notes and Attachments tab displays a (1) representing the one attachment or note on the document. The previous note created is displayed at the bottom of the Notes and Attachments tab.
51. | Click in the “Note Text” field.
52. | Enter “Please change the account number. See attached file.” in the Note Text field.
53. | Click on the “Browse” button in the Attached File field to search for the file to be attached.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>54.</td>
<td>The “File Upload” window opens.</td>
</tr>
<tr>
<td>55.</td>
<td>Select the desired file to attach to the eDoc. In this tutorial you will select the file “New Account Numbers for Training”.</td>
</tr>
<tr>
<td>56.</td>
<td>Click the “Open” button.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>-------</td>
<td>-----------</td>
</tr>
</tbody>
</table>
| 57.   | The file name is displayed under the **Attached File** field.  

**Note:** Prior to clicking the **add** button you can click the **cancel** button to remove the attachment. After you click the **add** button you can review the attachment (except on Vendor Maintenance docs), but no longer have the option to **cancel** the attachment prior to submitting the document.  

Click the “**add**” button under the **Actions** field to add the note and attachment to the document. 

**Note:** Users may view the attachments on all documents except the Vendor Maintenance eDoc. As such, attachments containing sensitive and/or personally identifiable information should be redacted before attaching or should not be attached if not required.

If you selected the wrong file, click “cancel” then re-select the file to attach. After you determine you selected the correct file click the “add” button.
58. Both the note and the attachment information are displayed at the bottom of the Notes and Attachments tab. The Notes and Attachments tab now contains a (2) representing two attachments and/or notes.

**Note:** The system prevents users from deleting attachments after they have been added to a document. If a file is attached in error, submit a trouble ticket to request the deletion: (http://www.hawaii.edu/kualifinancial/feedbackForm.php)

59. Since there are changes needed before the document can be approved; the document will be disapproved and returned to the initiator.

Click the “disapprove” button.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
</table>
| 60.    | All disapprovals must have an explanation.  
**Note:** A window opens for information related to disapprovals. All disapprovals require an explanation. Click in the **Please enter the reason below:** field. |
| 61.    | Enter "**Please order 2 more; however, we don't order office supplies from this account. Please use the new account numbers from the list attached to the eDoc.**" in the **Please enter the reason below:** field.  
**Note:** It is good business practice to enter an HR appropriate reason. |
<p>| 62.    | <strong>Important:</strong> The reason entered for the disapproval is also added to the <strong>Notes and Attachments</strong> tab, as well as, a note in the <strong>Route Log</strong> to this original document. |
| 63.    | Click the <strong>yes</strong> button to disapprove the document and to return the document to the initiator. |</p>
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>64.</td>
<td>The document is no longer in your <em>Action List</em> for an approval.</td>
</tr>
</tbody>
</table>

**Step 64:** The document is no longer in your *Action List* for an approval.
FYI a Document

In this process you will **take action** on documents that are in your **Action List** with an **Action Requested** of FYI.

There are three methods to process an FYI.

1. **FYI** actions can be processed on multiple documents at one time. This action does not require opening each document. For this option you would select **FYI** from the default drop-down list box in the upper right hand corner of the **action list** page. Then click the “**apply default**” button and all **Actions** fields for each document assigned to you for **FYI** will change from **NONE** to **FYI** (this applies to only the **FYI**s being viewed per page.) Then click the “**take action**” button at the bottom of the **action list** page. Once the **FYI** action has been taken the document will no longer be displayed in your **action list**.

2. You can click on the **Actions** field drop-down list box for an individual document that has been assigned to you for **FYI** and change the value from **NONE** to **FYI**. Then click the “**take action**” button at the bottom of the **action list** page. Once the **FYI** action has been taken the document will no longer be displayed in your **action list**.

3. To review a document that was sent to you as an FYI, select an individual document **Id** to display the document. When you are done reviewing the
document click on the “fyi” button at the bottom of the eDoc. Once the FYI action has been taken the document will no longer be displayed in your action list.

In this tutorial you will process the FYI using the first method.

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>66.</td>
<td>Click the “NONE” drop-down list box on the top right of the window.</td>
</tr>
<tr>
<td>67.</td>
<td>Select the “FYI” option from the drop-down list box.</td>
</tr>
<tr>
<td>68.</td>
<td>Click the “apply default” button.</td>
</tr>
<tr>
<td>69.</td>
<td>Each FYI document will now display an FYI under the Actions field.</td>
</tr>
<tr>
<td>70.</td>
<td>Click the “take actions” button at the bottom of the window.</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>--------</td>
<td>------------</td>
</tr>
<tr>
<td>71.</td>
<td>The FYI documents will no longer display in the <strong>Action List</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
</table>
| 72.    | When all of the documents assigned to you for action have been completed your **action list** will be empty and a **"No values match this search."** message will appear.  

**Note:** Remember the value you set in your **preferences** for **Notification** and **Refresh Rate**. If you set your **Notification** to **none** you will not receive an email that you have items in your **action list**. This option will require you to check your **action list** for new items. Also if you set your **Refresh Rate** to **0** you will not receive new items in your **action list** unless you click the **refresh** button in the upper right hand corner of the main **action list** page. |
| 73.    | **Important:** Account Supervisors will receive an FYI action request when an Account Maintenance document is submitted for an account which they are listed as the Account Supervisor. |
| 74.    | **End of procedure.** |
Reviewing the Route Log

Process

This tutorial explains how to review the Route Log for an eDoc.

The Route Log is often referred to as the map of a KFS electronic document. The Route Log keeps a record of information for an eDoc, such as; when the document was created, who created it, and the title it was given. The Route Log also displays the Actions Taken, the Pending Actions, and the Future Action Requests for a particular document.

The Route Log can be accessed by navigating to the Route Log tab within each document, or by clicking on the Route Log icon under the Log column on the action list.

<table>
<thead>
<tr>
<th>Step #</th>
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</thead>
<tbody>
<tr>
<td>75.</td>
<td>The Route Log tab displays information about the documents workflow status. The Route Log is like a map of where the document started (ID tab), where it has been (Actions Taken tab) and where it is going (Pending and Future Actions tabs).</td>
</tr>
<tr>
<td>Step #</td>
<td>Procedure</td>
</tr>
<tr>
<td>-------</td>
<td>-----------</td>
</tr>
<tr>
<td>76.</td>
<td>The Id tab shows information about the document and the workflow status.</td>
</tr>
<tr>
<td></td>
<td>• <strong>ID:</strong> is the <strong>Doc Nbr</strong> that is displayed in the document header found in the upper right hand corner on every eDoc.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Title</strong> shows the description entered in the <strong>Document Overview</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Type</strong> describes the type of eDoc created.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Initiator</strong> indicates the name of the individual who created the document.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Route Status</strong> displays the current workflow status of the document.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Node(s)</strong> shows the workflow process.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Created</strong> shows the time and date when the document was created.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Last Modified</strong> shows the last time the document was changed.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Last Approved</strong> displays the date and time the document was approved.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Finalized</strong> shows the date and time when the document status was changed to FINAL.</td>
</tr>
</tbody>
</table>
### Step # | Procedure
--- | ---
77. | The **Action Taken** tab displays the Actions that have been completed. This area shows more information about the document.  
- **Action** shows the action(s) that have been completed on the document.  
- **Taken By** displays the name of the person who performed the action.  
- **For Delegator** shows the name of the person who is the delegator of the account.  
- **Time/Date** shows when the action was completed.  
- **Annotation** displays an auto generated system note.
78. | The **Pending Action Requests** tab shows the next action and the person who needs to take action on the document.  
- **Action** shows the action needed to move the document through the workflow process.  
- **Requested of** shows the name of the person who needs to complete the next action.  
- **Time/Date** shows when the route node was generated.  
- **Annotation** displays an auto generated system note that describes the route request.  
- **In Action List** indicates the Action List(s) the document is in.
<table>
<thead>
<tr>
<th>Step #</th>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>79.</td>
<td>The Future Action Requested tab displays the actions that need to be taken on the document after the Pending Actions are satisfied; and include the same columns as the Pending Action Requests.</td>
</tr>
<tr>
<td>80.</td>
<td>The Log Action Message may be used to add a message to the Route Log. This could be used to log messages related to the status of the document. <strong>Note</strong>: This message is only in the Route Log and does not show up in the Notes and Attachments tab.</td>
</tr>
<tr>
<td>81.</td>
<td>End of procedure.</td>
</tr>
</tbody>
</table>
Appendix A

The following is a sample email you will receive if you set the Email Notification field to either Daily or Weekly on the Action List preferences page.

Your Action List has 12 eDocs (electronic documents) that need your attention:

- 6 IdentityManagementPersonDocument
- 1 ACCT
- 1 AWRD
- 1 DV
- 1 PVEN
- 1 IdentityManagementRoleDocument
- 1 ParameterMaintenanceDocument

To respond to each of these eDocs:

Go to https://kfs.hawaii.edu/kfs-prd/kew/ActionList.do, and then click on its numeric DocumentID in the first column of the List.

To change how these email notifications are sent (immediately, weekly or none):

Go to https://kfs.hawaii.edu/kfs-prd/kew/Preferences.do

For additional help, email <mailto:kfs-help@lists.hawaii.edu>

Note: It is suggested to click on the 1st link which takes you directly into your Action List where you can click on the document id you would like to take action on.
Appendix B

The following is a sample email you will receive if you set the **Email Notification** field to **Immediate** on the **Action List** preferences page.

<table>
<thead>
<tr>
<th>Your Action List has an eDoc (electronic document) that needs your attention:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Document ID:</strong> 177758</td>
</tr>
<tr>
<td><strong>Initiator:</strong> Initiator, Name</td>
</tr>
<tr>
<td><strong>Type:</strong> Add/Modify ACCT</td>
</tr>
<tr>
<td><strong>Title:</strong> Edit Account - 002-CG39-Create FY13 Formula Fund Acct</td>
</tr>
</tbody>
</table>

To respond to this eDoc:

Go to https://kfs.hawaii.edu/kfs-prd/kr/maintenance.do?methodToCall=docHandler&docId=177758&command=displayActionListView

Or you may access the eDoc from your Action List:

Go to https://kfs.hawaii.edu/kfs-prd/kew/ActionList.do, and then click on the numeric Document ID: 177758 in the first column of the List.

To change how these email notifications are sent (daily, weekly or none):

Go to https://kfs.hawaii.edu/kfs-prd/kew/Preferences.do

For additional help, email <mailto:kfs-help@lists.hawaii.edu>

**Note:** It is suggested to click on the 1st link which takes you directly into the document.
## Changes To Previous Training Manual

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Section/page</th>
<th>Initials</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.03</td>
<td>03/28/2016</td>
<td>Resources p 4</td>
<td>tv, lr</td>
<td>Replaced Training section</td>
</tr>
<tr>
<td>3.02</td>
<td>08/13/2015</td>
<td>Resources</td>
<td></td>
<td>Updated resources section to fit on one page and placed on page before Objectives</td>
</tr>
<tr>
<td>3.01</td>
<td>05/18/2015</td>
<td>Screenshots</td>
<td>lr</td>
<td>Revised screenshots</td>
</tr>
<tr>
<td>3.01</td>
<td>05/01/2015</td>
<td>Resources</td>
<td>lr</td>
<td>Updated resources section with new FMO Website info, footer, title page and table of contents</td>
</tr>
</tbody>
</table>