




Kuali Financial System

KFS6 - Recall Action

Background

A new **recall** button  is available in KFS 6 that allows an initiator to recall a completed/submitted **Financial Processing** document for editing or for canceling provided it has not been acted upon by any other user.

Previously, if an initiator discovered an issue with a financial processing document after it was completed/submitted, the initiator would have to contact the next approver to disapprove the document and complete/submit a new document if applicable.

The recall action is only available to the initiator for **Financial Processing** documents that are capable of being disapproved and are not automatically finalized upon complete/submit.

The Recall functionality is available as follows for the commonly used **Financial Processing** documents:

Doc Type	Doc Type Name	Recall?	
AD	Advance Deposit	Y	
BA	Budget Adjustment	Y	*
CCR	Credit Card Receipt	Y	
DI	Distribution of Income and Expense	Y	
GEC	General Error Correction	Y	
IB	Internal Billing	Y	
IAA	Intra-Account Adjustment	Y	*
PE	Pre-Encumbrance	Y	*
SSBA	Single-Sided Budget Adjustment	Y	*
TF	Transfer of Funds	Y	
ND	Non-Check Disbursement	Y	*
SB	Service Billing	N	
*Recall functionality is NOT available if additional FO, sub-fund review or ad hoc approval is <u>not</u> required.			



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Getting Started

The recall button is made available to the initiator after the document is completed/submitted and before the next action is taken by another user.

The screenshot shows a 'Route Log' window for document ID 2395839. The document title is 'General Error Correction - 054-Correct AD 2412842 Obj Code'. The initiator is 'Chun, Elaine'. The route status is 'ENROUTE'. Below the details is a table of actions taken:

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Chun, Elaine		01:45 PM 12/22/2017	
COMPLETED	Chun, Elaine		01:54 PM 12/22/2017	

At the bottom of the window, there are several buttons: 'send ad hoc request', 'reload', 'close', 'recall' (highlighted in red), and 'copy'.

To recall a financial processing document **immediately after** it has been completed/submitted and **before** the next action is taken by another user, the initiator selects the recall button , completes the Recall to Action List or Recall and Cancel document reason and selects the recall to action list or recall and cancel button.

The screenshot shows a dialog box titled 'Recall to Action List or Recall and Cancel document?'. It prompts the user to enter a reason for the recall. The reason entered is 'Recall to action list to enter sub-account SALES'. At the bottom of the dialog, there are two buttons: 'recall to action list' and 'recall and cancel', both of which are highlighted in red.



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Recall to action list

The screenshot displays the Kuali Financial System interface for document ID 2395839. The document is in a 'SAVED' status. The 'Route Log' section shows a 'RECALL' action performed by 'Chun, Elaine' on 12/22/2017 at 01:56 PM. The annotation for this action reads: 'echun recalled document: Recall reason - Recall to action list to enter sub-account SALES'. The 'Notes and Attachments' tab also shows a note added with the same recall reason.

After the recall to action list button was selected:

GEC 2395839 in SAVED status was editable for initiator.

Route Status changed from ENROUTE to SAVED

Fields in Document Overview and Accounting Lines are editable.

Notes and Attachments and Route Log tabs were updated.

Note added in Notes and Attachments tab

The screenshot shows the 'Notes and Attachments' tab with a single note added. The note text is: 'Recall reason - Recall to action list to enter sub-account SALES'. The author is 'Chun, Elaine' and the timestamp is '12/22/2017 01:56 PM'.


Route log changes:

Actions Taken=RECALL with Recall reason displayed in Annotation.

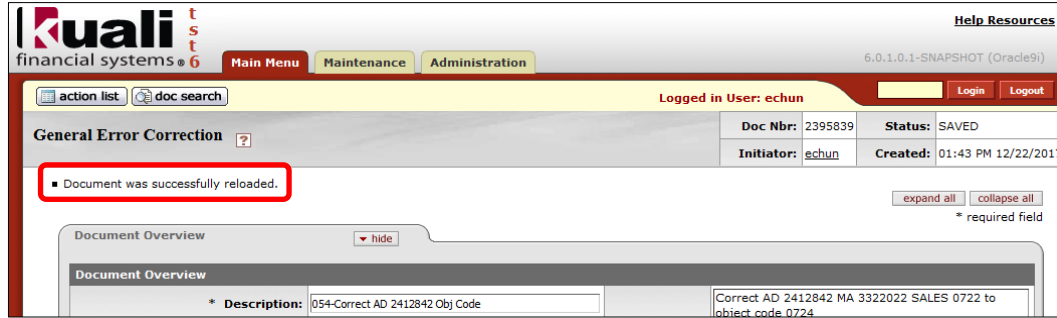
Pending Action Requests=IN ACTION LIST COMPLETE with Action COMPLETE generated by Workflow because echun took action RECALL.



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IMPORTANT: Before editing the recalled document, select the reload button  and successfully reload the document before making any changes. Note: Reloading the document removes any previous ad

hoc recipient assignments. When editing the document, re-enter the ad hoc recipients if applicable.



The screenshot shows the 'General Error Correction' page. A message box at the top left states: 'Document was successfully reloaded.' The document details are: Doc Nbr: 2395839, Status: SAVED, Initiator: echun, Created: 01:43 PM 12/22/2017. The description is '054-Correct AD 2412842 Obj Code'.

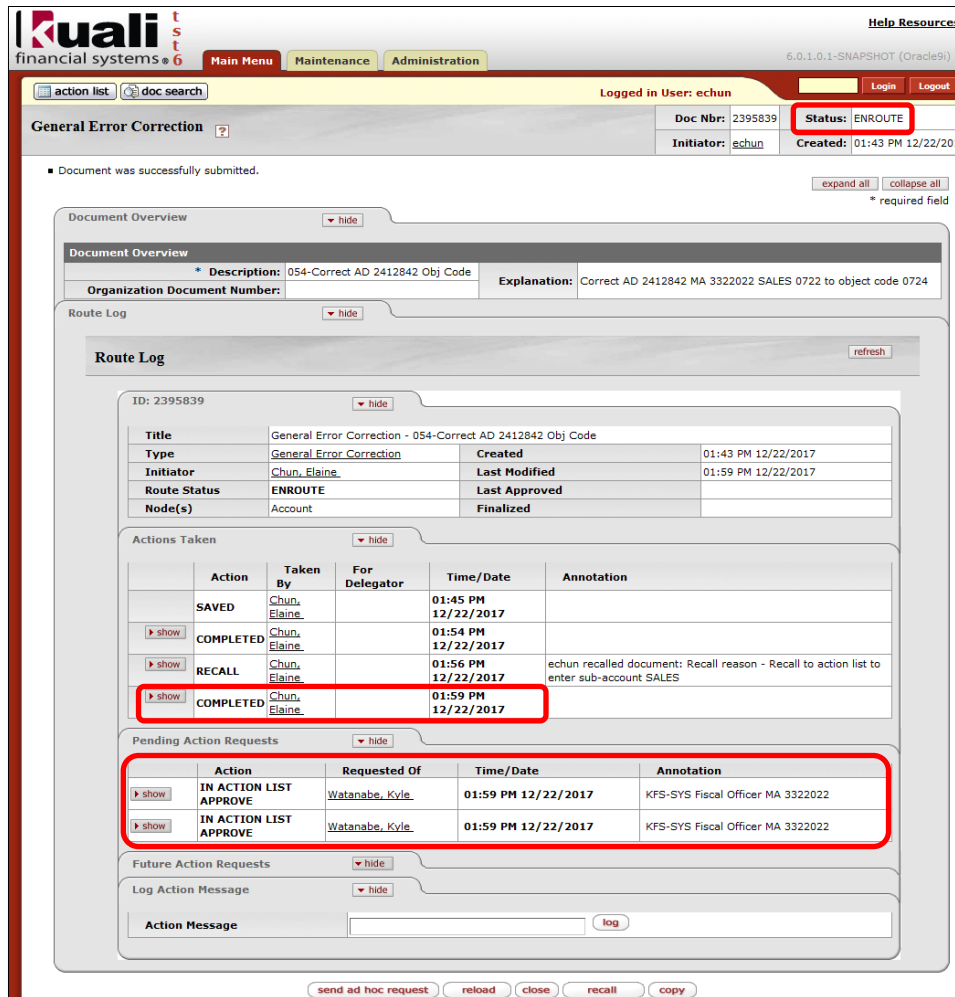
If you do not reload the document before editing the recalled document, upon save or submit the following error message will be displayed. If you receive this message, press the reload button, re-enter your edits and

ad hoc recipients if applicable then save or submit.



The screenshot shows an error message: '1 error(s) found on page.' The error details are: 'Errors found in this Section: This document has already been modified by another user. Press the "reload" button to replace your copy of the document with the newer version.'

After successfully submitting the edited recalled GEC 2395839, Status=ENROUTE



The screenshot shows the 'General Error Correction' page with the status updated to 'ENROUTE'. The document details are: Doc Nbr: 2395839, Status: ENROUTE, Initiator: echun, Created: 01:43 PM 12/22/2017. The description is '054-Correct AD 2412842 Obj Code'. The route log shows the following actions:

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Chun, Elaine		01:45 PM 12/22/2017	
COMPLETED	Chun, Elaine		01:54 PM 12/22/2017	
RECALL	Chun, Elaine		01:56 PM 12/22/2017	echun recalled document: Recall reason - Recall to action list to enter sub-account SALES
COMPLETED	Chun, Elaine		01:59 PM 12/22/2017	

The pending action requests section shows two requests for approval from Watanabe, Kyle at 01:59 PM 12/22/2017.

Route Log changes:
Actions Taken=COMPLETED
Pending Action Requests=IN ACTION LIST APPROVE for Fiscal Officer.
Note:
Recall button available



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Recall and Cancel

To recall and cancel a financial processing document **immediately after** it has been completed/submitted and **before** the next action is taken by another user, the initiator selects the recall button, completes the Recall to Action List or Recall and Cancel document reason and selects the recall and cancel button.

Backdoor Id echun is in use

Recall to Action List or Recall and Cancel document?

* Please enter the reason below:

Recall and Cancel, reallocation not required

After the recall and cancel button was selected: DI 2395842 Status=RECALLED, Route Log Actions Taken=RECALL with Recall reason displayed in Annotation, No Future Action Requests.

Backdoor Id echun is in use

Distribution Of Income And Expense	Doc Nbr: 2395842	Status: RECALLED
	Initiator: echun	Created: 02:24 PM 12/22/2017

* required field

Document Overview ▼ hide

* Description: 054-Reallocate subsidy		Explanation: Reallocate Deferred subsidies from 3331472 SUBS to 3322022 SUBS
Organization Document Number:		
Financial Document Detail		
	Total Amount:	500.00

Route Log ▼ hide

Backdoor Id echun is in use

ID: 2395842 ▼ hide

Title	Distribution Of Income And Expense - 054-Reallocate subsidy		
Type	Distribution Of Income And Expense	Created	02:24 PM 12/22/2017
Initiator	Chun, Elaine	Last Modified	02:37 PM 12/22/2017
Route Status		Last Approved	
Node(s)	Account	Finalized	02:37 PM 12/22/2017

Actions Taken ▼ hide

	Action	Taken By	For Delegator	Time/Date	Annotation
	SAVED	Chun, Elaine		02:27 PM 12/22/2017	
<input type="button" value="show"/>	COMPLETED	Chun, Elaine		02:34 PM 12/22/2017	
<input type="button" value="show"/>	RECALL	Chun, Elaine		02:37 PM 12/22/2017	echun recalled document: Recall reason - Recall and Cancel, reallocation not required

Future Action Requests ▼ hide

Action	Requested Of	Time/Date	Annotation

Log Action Message ▼ hide

Action Message



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If you want to recall a document **after** leaving the initial eDoc input screen but **before** the next action is taken by another user, open the document from the Document Search.

Document Search results table:

Document Id	Document Type	Title	Status	Initiator	Date Created	Route Log
2395842	Distribution Of Income And Expense	Distribution Of Income And Expense - 054-Reallocate subsidy	ENROUTE	Chun, Elaine	12/22/2017 02:24 PM	

The Recall button is available if the next action was not taken by another user. Follow the Recall to Action List or Recall and Cancel procedures above.

Document Overview and Route Log details:

- Document Overview:**
 - Description: 054-Reallocate subsidy
 - Explanation: Reallocate Deferred subsidies from 3331472 SUBS to 3322022 SUBS
 - Organization Document Number: [blank]
 - Financial Document Detail: Total Amount: 500.00
- Route Log:**
 - ID: 2395842
 - Title: Distribution Of Income And Expense - 054-Reallocate subsidy
 - Type: Distribution Of Income And Expense
 - Created: 02:24 PM 12/22/2017
 - Initiator: Chun, Elaine
 - Last Modified: 02:34 PM 12/22/2017
 - Route Status: ENROUTE
 - Last Approved: [blank]
 - Node(s): Account
 - Finalized: [blank]
- Actions Taken:**

Action	Taken By	For Delegator	Time/Date	Annotation
SAVED	Chun, Elaine		02:27 PM 12/22/2017	
COMPLETED	Chun, Elaine		02:34 PM 12/22/2017	
- Pending Action Requests:**

Action	Requested Of	Time/Date	Annotation
IN ACTION LIST APPROVE	Watanabe, Kyle (Primary Delegate)	02:34 PM 12/22/2017	Delegation of: KFS-SYS Fiscal Officer MA 3331472 to principal kshiga21
IN ACTION LIST APPROVE	Watanabe, Kyle	02:34 PM 12/22/2017	KFS-SYS Fiscal Officer MA 3322022