

Welcome to the Financial System!!

Important Information to note:

Please read this document all the way through. Many of your questions will be answered here. There are also 2 to-do items for each user.

We refer to the system as **FSKU**.

Access:

Users will access the system via the web at the URL = <https://fin.ku.edu>

The URL can be found via the KU Home Page alphabetical search under FSKU and Financial Management System.

A link to the system will also be on the Comptroller's Home Page in the Financial System Administration area. Look for the FSKU link.

<http://www.comptroller.ku.edu/>

The URL can be saved as one of your internet favorites



ID and Password:

Your KU Online ID (the same used to access Exchange email and Kyou Portal) will be your User ID and password to FSKU. The ID is not case sensitive (upper and lower case allowed). The password is case sensitive.

Within FSKU, you will see your ID and Buyer Name appear as Last Name First Initial (e.g. HAWKJ).

Staying Informed:

As a user of the financial system, you will be added to our listserv "Hawkfin". We will keep users informed on system changes and maintenance, as well as business policies and other key activities via Hawkfin messages.

"How To" documents and system information can be found on the web. Look for tips and training materials here.

http://www.comptroller.ku.edu/financial_systems_administration/people_soft_9/

Reporting:

Some financial reports are available directly from FSKU using predefined reports or query. To run predefined reports, the users should be familiar with Run Controls and the Report Manager. Query training is still being developed.

Reports are also available from our KU web reporting tool called DEMIS. Information on accessing DEMIS Portal can be found at this web site:

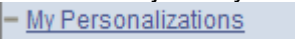
http://www.comptroller.ku.edu/financial_systems_administration/people_soft_9/DEMISportal.pdf

Before getting started in FSKU, please be sure to complete the following 2 To Do items:

TO DO ITEMS for each user

To Do Item 1 - Personalize FSKU:

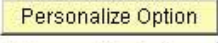

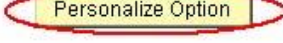
Log into FSKU and do this before adding a transaction.

To skip past the look up and miscellaneous icons on the page, users need to adjust “My Personalizations” – a selection at the bottom of your FSKU menu. 

Select the “Navigation Personalizations” Personal Options button.

Personalized settings are in effect.


Changes to Personalization settings require you to log off and log back on in order to take effect.

Personalization Categories	
Description	Personalize Option
General Options	
Regional Settings	
System & Application Messages	
Navigation Personalizations	

Select “YES” for all but the first item so your page looks like the picture below:

Option Category: Navigation Personalizations


Personalizations			Find	First	1-10 of 10	Last
Personalization Option	Default Value	Override Value				
Automatic menu collapse	No	<input type="text" value=""/>				Explain
Tab over Calendar Button	No	Yes				Explain
Tab over Grid Tabs	No	Yes				Explain
Tab over Header Icons	No	Yes				Explain
Tab over Lookup Button	No	Yes				Explain
Tab over Navigation Bar	No	Yes				Explain
Tab over Browser Elements	No	Yes				Explain
Tab over Page Links	No	Yes				Explain
Tab over Related Page Links	No	Yes				Explain
Tab over Toolbar	No	Yes				Explain

Click 

And the system confirms your changes:

Save Confirm

 Your Personalizations have been saved.



You must log out of FSKU to make the changes take effect. Your navigation will now tab over most icons, hyperlinks and toolbars and go straight into data entry fields.

To Do Item 2 – Customize:

PeopleSoft comes delivered with many fields that do not apply to KU business practices. The users can select from customized settings that include SpeedCharts for grant related activities or excludes SpeedCharts.

The following action is recommended to be done for each transaction type when you – Voucher, PO, BPC, SOV, Deposit, and Journal. Once done on a transaction type it will apply to all subsequent transactions.

If you ever need to use grant funding, select the option that includes “_W_SPEEDCHART”. If you don’t use grant funding, select the option where the name contains the most current date “JULY2009”.

Sign into FSKU and enter a transaction type, e.g. Accounts Payable – Voucher – Regular Entry


The pages where you enter chartfields (account, fund, dept) are where you can apply customized settings.

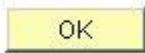
Once in a transaction, look for the [Customize](#) link on the blue bars and click on the link to open.

Look for the [Copy Settings](#) line at the bottom of the Customize page and click on the link:

Copy Settings



 Use the Look Up icon to see the settings available and select from the list for the setting that best fits your business needs – with or without SpeedCharts.

Click the  buttons at the bottom of each page until you return to the transaction page.

Your new settings should be in place and will be there for each new transaction of that type.

The process will need to be repeated for each type of transaction you use (Voucher, PO, BPC, SOV, Deposits, Journal, and Budget).

Questions?

FSKU and DEMIS System Contacts

Jennifer Hanson, System Administrator jjhanson@ku.edu or 864-5867.

Contacts in Central Accounting Services

Visit the staff listings for these departments at the following web sites:

http://www.comptroller.ku.edu/central_accounting_services/about_us/meet_staff.aspx