Kuali Financials 6.0
Upgrade
Frequently Asked Questions

How can we help?
We want you to have the simplest, easiest user experience possible, but we know you might have a few questions. Here are answers to the most repeatedly asked and thought of questions related to using the new version of Kuali Financials. As always, feel free to contact Finance Campus Support at 201-216-8000 or finance-support@stevens.edu.

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Frequently Asked Questions and Answers
Where are all the links to documents?

- All of the old links for documents such as the Requisition and Disbursement Voucher have been moved to new sections on the ribbon on the left side of the screen. You can click on each section to open it and see the links under it. Note that you will only see links to things you have access to.
- We highly recommend using the Search bar located at the top of the ribbon the left side of your screen to search for the document type you are looking for.
- For more information, please view the short informational video titled “Introduction to Kuali Financials 6.0,” which can be found on YouTube.

Why can I not find the document type when using the Search bar?

- Make sure you that you are using the actual document type name, instead of the abbreviation. For example, using “DV” will not bring back the Disbursement Voucher. Type “disb” or “vouch” to return the link to the document. Searches are not case sensitive.
- Make sure you have used at least 3 letters.

How do I add accounting lines on my Requisition?

- On each item line, there is small book with a dollar on the far right side ($. Click it to expand the accounting line section.
- Alternatively, you can use the ‘Setup Distribution’ feature to apply the same accounting line to all of the items on your requisition.
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For more information, please review the information under ‘Requisition Guides’ at the following link: http://www.stevens.edu/directory/finance/kfs-kuali-financial-system/guides

Why can't I submit my Requisition?

- Scroll to the top of your document and review for error messages. If it reads, “This document must be calculated prior to submitting”, then you need to click the ‘Calculate’ button located on the ribbon on the bottom of your screen. After calculating, you will be able to submit your document.

- Scroll to the top of your document and review for error messages. Scroll to the relevant tab with messages, as necessary. Check the Accounting Lines tab for a message similar to “No Accounting Lines were entered on Item X of this Requisition.” This is a new requirement; in previous versions, the document would route back to your action list to complete the accounting lines if they were left blank. Note that if you have a reviewer in your department that normally completes the accounting lines for your requisitions, that process did not change. In order to access the accounting lines, you need to click the $ icon next to each line item.

Why can't I print my document?

- Due to the way documents are presented on the screen, including the new static action button ribbon at the bottom, printing the document from your browser is no longer supported. We know many of you keep original supporting documentation, and print the related Kuali Financials document for your internal records. Scanning and attaching supporting documentation for Disbursement Vouchers and Requisitions is now required, no paper should be sent to Accounts Payable. The attached documents will be associated with the Kuali Financials document forever, and can be downloaded at any time. We highly encourage you to allow Kuali Financials to store your original supporting documents and the transaction itself and allow you to get rid of those big binders and replace it with a simple log (or nothing at all! All Kuali Financials documents can be easily found in a document search.) Please contact us if you have a business purpose that needs a printed Kuali Financials document.

Why is the screen not displaying, or not displaying correctly?

- Kuali Financials is NOT supported in Safari or Internet Explorer. You will see multiple issues including the page not fully rendering, drop down options not displaying, and missing text fields. Use Mozilla Firefox or Google Chrome for the best experience.

- If you insist on using Internet Explorer, please follow these directions:
  1. Click on the gear icon in the upper right corner
  2. Click on “Compatibility View settings”
  3. Uncheck the box that reads “Display intranet sites in Compatibility View”

- We know many of you utilize Kuali Financials on your smart phone for approvals and quick lookups, a feature that is still encouraged in the newest version. However, you will need to use either Firefox or Chrome; both are available in the Apple App Store and Google Play Store, and one of them will be needed for Kuali Financials to appropriately display on your smart phone.
Why is my Import Template not working?

- Ensure that you are using the new Import Templates for Kuali Financials 6.0. They can be accessed from the import template link on every accounting line or from the Finance website at this link: [http://www.stevens.edu/directory/finance/kfs-kuali-financial-system/guides](http://www.stevens.edu/directory/finance/kfs-kuali-financial-system/guides), under the “Import Accounting Lines” ribbon.