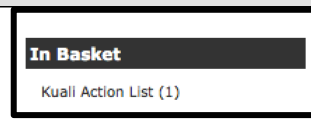
Job Aid: Using Action List in KFS

Purpose: The purpose of this job aid is to list and describe the **Action List** features in KFS. In this job aid, you will learn about:

Action List Purpose and Location

The purpose of the **Action List** button is to alert a user about one or more **Documents** that require the user's attention. The **Action List** button appears in two places:

Location	Visual Cue
In AccessPlus: Under a link called **Kuali Action List** located on the **AccessPlus** homepage. The number in parentheses displays the number of **Actions** waiting in your action list and your delegates action list.	
In the top left corner of all **KFS Screens** beginning with the **KFS Main Menu** page.	

Action Descriptions

The actions that are required for you to take in your Action List will depend on your role or responsibilities on the Account. The table below lists and describes required and recommended actions to be taken by the user depending on the user's role on the Account(s):

Action to Take	Description
Acknowledge	Document will continue routing without any action on your part. Document can be removed directly from your Action List without opening.
Approve	Document is waiting for your action. Review the eDoc for accuracy and appropriateness. If error-free, approve the action. If errors exist, you may be able to make changes (depending on what fields need to be changed); otherwise, you will need to disapprove the document. In that case, the Initiator is notified and will need to create a new document.
FYI	Document will continue routing without any action on your part. Document can be removed directly from your Action List without opening. For more information about changing how you receive notices and setting preferences, refer to the Preferences, Refresh, and Filter Options in Action List and Action List Preferences sections below.

Note: For more information about roles, refer to the **Connecting People to Accounts** section in the **Understanding Accounts Job Aid**.

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Action List Attributes

The table below lists and describes document attributes and descriptions commonly displayed as table headers on the **Action List** screen based on your set **Preferences**.

Document Attributes	Description
Id	Corresponds to the Document Number (Doc Nbr) generated at the time the Document was created. Clicking the Id link will open the Document. The Id is the same as the Doc Nbr, which is located in the top right corner of the eDoc.
Type	Corresponds to the type of Document created (Vendor, Disbursement Voucher, etc.).
Title	Corresponds to the Type and Description generated at the time the Document was created. For example: "Distribution of Income and Expense – Allocate cost of conference".
Route Status	Describes where in the process the Document is and corresponds to the Route Log generated during the Document approval process. For more details refer to the Document Route Log section below.
Action Requested	Indicates the action you need to take on the eDoc (Approve, Acknowledge, or FYI). The Action List can be sorted by this field so that items needing to be Approved are together.
Intitiator	Indicates the user who created the Document and put it into routing. This information becomes a part of the Route Log generated during the Document approval process.
Delegator	Identifies the person on whose behalf you are taking the action. This information becomes a part of the Route Log generated during the Document approval process.
Date Created	Corresponds to the original date the Document was created.
Last Approved Date	Indicates when the last action was taken on the Document.
Group Request	Indicates the group to which the user belongs.
Log	Opens the Route Log for the eDoc showing individuals in the routing process.
Clear FYI	Allows user to clear all FYI items from action list instead of opening each one.

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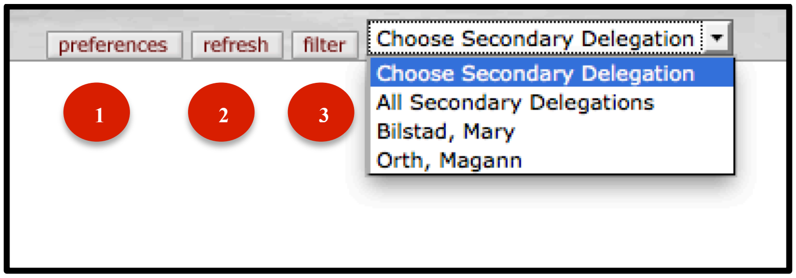
Preferences, Refresh, and Filter Options in Action List

Along with the **Choose Secondary Delegation** button described at the end of this document, three other buttons appear on the top right side of the **Action List** screen. These buttons allow you to change other settings and the look of your **Action List**:

1. Preferences button – Opens the **Workflow Preferences** screen. See descriptions below.
2. Refresh button – Allows you to reload your active **Action List** without any changes.
3. Filter button – Opens the **Action List Filter** screen. See Descriptions below.



Action List Preferences

The **Preferences** button opens a **Workflow Preferences** screen, which allows you to choose how you want to view your **Action List**. The **Workflow Preferences** screen is divided into four sections described below:

1. General
2. Fields Displayed in Action List
3. Document Route Status Colors for Action List Entries
4. Email Notification Preferences

General Preferences

The **General** section of the **Workflow Preferences** screen allows you to select from the following **Action List** settings:

General Section	Description
Automatic Refresh Rate	How often you want your Action List to automatically update. Zero '0' means you do not want an automatic refresh.
Action List Page Size	How many Actions you want listed per page.
Delegate Filter	Where you want Secondary Delegate to show up. Do not change this Default setting.
Primary Delegate Filter	Where you want Primary Delegate to show up. Do not change this Default setting.

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Fields Displayed in Action List
This option allows you to select the fields you want displayed on the **Action List** screen. Fields to choose from are described in the **Document Attributes in Action List** section above.

Document Route Status Colors for Action List
This option allows you to color-code your **Route Status** column on the **Action List** table. The default selection is “no color”. Below is a list and descriptions of each **Route Status** option:

Document Route Status	Description
Saved	The Document has been started but not completed or routed. You can Save your work, close the Document, and retrieve it from your Action List for completion and routing at a later time.
Initiated	The Document has been created but not saved or submitted.
Disapproved	An Approver has denied the Document.
Enroute	Approval requests on the Document are pending.
Approved	The Document has been approved and now considered a valid business transaction.
Final	The Document has been approved and will post to the General Ledger the morning after the document reaches final status.
Processed	The Document has no pending approval requests but still waiting for acknowledgement. Processed Documents are considered approved.
Exception	The Document has been routed to an exception queue due to a routing error during processing.
Canceled	The Document is denoted as VOID and should be disregarded. These are usually Documents that you created then canceled before submitting it for approval.

Email Notification Preferences
This option allows you to choose if and when you want to receive an email notification about the **Action** to be taken and to specify the **Document Types.** Users who routinely access their **Action List** may want to set the **Default Email Notification** to none to turn off the email notification.

Email Notification Preferences	Description
Receive Primary Delegate Emails	ISU is not encouraging the use of Primary Delegates.
Receive Secondary Delegate Emails	Check if you want to receive emails notifying you of Secondary Delegate action requests.
Default Email Notification	How often you want to receive email notifications.
Document Type Notifications	Type of eDocs for which you would like to receive email notifications and how often.
Send Email Notifications For	Which notifications you would like to receive: Complete, Approve, Acknowledge, and/or FYI.

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Changing Your Filters

The **Filter** button opens an **Action List Filter** screen, which allows you to display a subset of the **Action List** by specifying filter criteria based upon parameters below. For example, you could set the **Action Requested** filter so that only the Document needing to be approved appears.

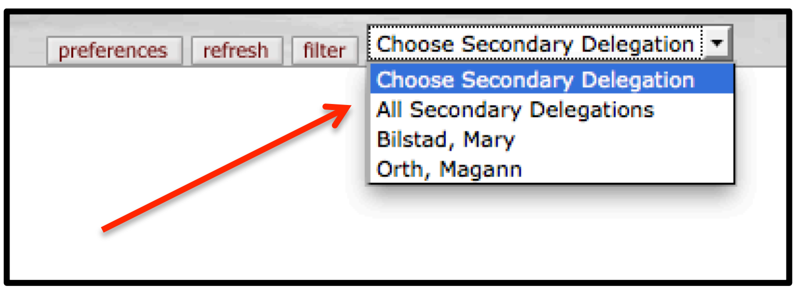
Parameters	Description
Document Title	Not likely to be useful at ISU.
Document Route Status	Not likely to be useful at ISU.
Action Requested	Allows you to choose which actions you want to see in Action List. You may check Exclude if you want to exclude certain actions.
Action Requested Group	Allows you to exclude or include the name of a Group on which you are requested to take action.
Document Type	Leave box unchecked.
Date Created	Allows you to enter a date range or select dated from the calendar to limit the documents based on the date the Documents were created.
Date Last Assigned	Allows you to enter a date range or select dated from the calendar to limit the documents based on the date the Document was last assigned to you.

Note: If there is a filter in place, the **Clear Filter** button will appear in the upper right corner of the **Action List** screen. To view your entire **Action List**, click **Clear Filter**.

Including Delegates in Your Action List

An eDoc needing the Fiscal Officer's approval will appear only in the Fiscal Officer's **Action List**, not the Delegate's. If you are a Delegate and need to see eDocs, you can use the **Choose Secondary Delegation** dropdown list to make the eDocs appear in your **Action List**.

You can select either **All Secondary Delegations** to see all eDocs for which you are the Delegate or select the name of an individual. An individual's name would be used if this normal Approver (Fiscal Officer) is away from work. You can change the dropdown back once the individual returns.



Note: This dropdown will not appear until a transaction on an Account for which you are the delegate is initiated.