KUALI FINANCIAL SYSTEM UNIVERSITY of CALIFORNIA • IRVINE

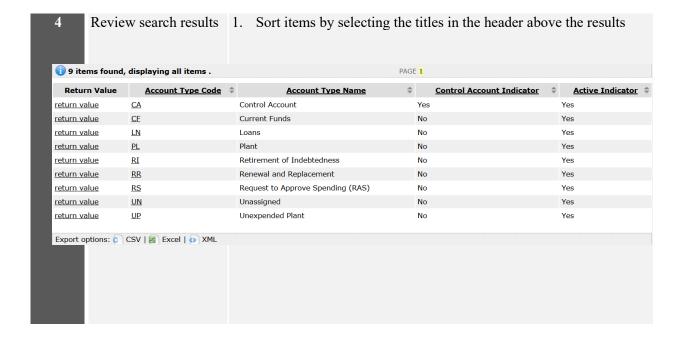
QUICK START GUIDE: LOOK UP AN ACCOUNT TYPE

Summary: All KFS Accounts have an associated Account Type code. The Account Type code is an attribute of a KFS Account that identifies the type or source of the funds.

Replacement: The FS AF-Account table will be replaced by the KFS Account Type Lookup.

Steps	What you need to do	How to do it
1	Access KFS via ZOTPortal	 Use your UCInetID and password to log in to https://portal.uci.edu/ Press the Faculty and Staff tab and then select the KFS tab
2	Access Account Type	 Navigate to the KFS Lookups and Request portlet Expand the Chart of Accounts bullet Select Account Navigate to the Account Type Code field and press the magnifying glass icon on the right
3	Enter search criteria	1. Enter desired search criteria
	Account Type Lookup ?** required fi	
		Account Type Code:
	Account Type Name:	
	Control Account Indicator: O Yes O No O Both	
	Active Indicator: Yes O No O Both	
	search clear cancel	
	Note: You can search with partial information by placing an asterisk (*) before and/or after the portion of the search criteria 2. Press search button once you've entered the desired search criteria	

Updated 01/10/14 1 | P a g e



Updated 01/10/14 2 | P a g e