

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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> Enter desired search criteria <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="background-color: #005596; color: white; padding: 5px;">Account Type Lookup ?</div> <div style="text-align: right; font-size: small;">* required field</div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="padding: 5px;">Account Type Code:</td> <td style="padding: 5px;"><input style="width: 100%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Account Type Name:</td> <td style="padding: 5px;"><input style="width: 100%;" type="text"/></td> </tr> <tr> <td style="padding: 5px;">Control Account Indicator:</td> <td style="padding: 5px;"> <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both </td> </tr> <tr> <td style="padding: 5px;">Active Indicator:</td> <td style="padding: 5px;"> <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both </td> </tr> </table> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> </div> </div> <p style="font-size: small; margin-top: 10px;">Note: You can search with partial information by placing an asterisk (*) before and/or after the portion of the search criteria</p> <ol style="list-style-type: none"> Press search button once you've entered the desired search criteria 	Account Type Code:	<input style="width: 100%;" type="text"/>	Account Type Name:	<input style="width: 100%;" type="text"/>	Control Account Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both	Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Account Type Code:	<input style="width: 100%;" type="text"/>									
Account Type Name:	<input style="width: 100%;" type="text"/>									
Control Account Indicator:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both									
Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both									

4

Review search results

1. Sort items by selecting the titles in the header above the results

9 items found, displaying all items .

PAGE 1

<u>Return Value</u>	<u>Account Type Code</u>	<u>Account Type Name</u>	<u>Control Account Indicator</u>	<u>Active Indicator</u>
return_value	CA	Control Account	Yes	Yes
return_value	CF	Current Funds	No	Yes
return_value	LN	Loans	No	Yes
return_value	PL	Plant	No	Yes
return_value	RI	Retirement of Indebtedness	No	Yes
return_value	RR	Renewal and Replacement	No	Yes
return_value	RS	Request to Approve Spending (RAS)	No	Yes
return_value	UN	Unassigned	No	Yes
return_value	UP	Unexpended Plant	No	Yes

Export options: [CSV](#) | [Excel](#) | [XML](#)