New Financial System: KFS

As of July 2014, UCI has transitioned to a new financial system, KFS. You will need to create a TEM Profile and add Samantha Anderson-Mekhail (UCInetID: sanders2) to be reimbursed through the ADVANCE Program.

Accessing KFS

Video Tutorial: https://www.youtube.com/embed/om5ECHSP7W8?rel=0

1. Go to ZotPortal (http://portal.uci.edu)
2. Login using the LOGIN link at the top right corner
3. Click Faculty & Staff at the top menu bar.
4. Click KFS on the menu below Faculty & Staff

Creating your TEM Profile

The TEM Profile is required for one to be reimbursed for travel and/or entertainment.

Video Tutorial: https://www.youtube.com/embed/rCr5vs_WSkU?rel=0

1. In the KFS Travel and Event Management portlet, click TEM Profile
2. Click TEM Profile Lookup
3. Click the Create New Profile button in the upper right-hand corner.
   a. Note: If you do not see this button in the upper right-hand corner, your TEM Profile already exists; there is no further action needed to create a TEM Profile
4. Once you have completed the form and verified that all information is correct, scroll down to the bottom of the page and click the Submit button to create your TEM Profile.
Adding a New Arranger to Your TEM Profile

An Arranger is someone who can initiate documents to process reimbursements for your TEM Profile.

Video Tutorial: https://www.youtube.com/embed/YKVuQ66tV50?rel=0

1. In the KFS Travel and Event Management portlet, click TEM Profile

2. Click TEM Profile Lookup

3. Find your TEM profile: In Principal Name, input your UCInetID and click Search.

4. Search results will appear below. In the leftmost column, click edit.

5. In the Description field of the Document Overview tab, input the following text: Adding Samantha Anderson-Mekhail (sanders2) as Arranger.

6. If it is not already open, click Show next to the Arrangers tab.

7. Under New Arranger Information, click the magnifying glass icon and input the UCInetID of your new Arranger (sanders2) into the Principal Name field.

8. Search results will appear below. In the leftmost column, click return_value.

9. sanders2 should now be displayed next to Principal Name. Click Add.

10. Scroll down to the bottom of the page and click Save.

11. Scroll down to the bottom of the page and click Submit.