

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

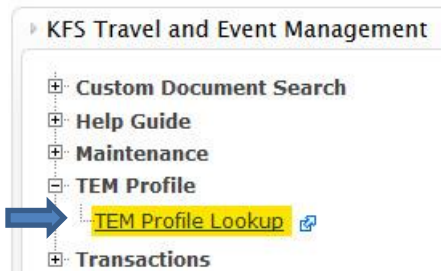


Creating your TEM Profile

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**



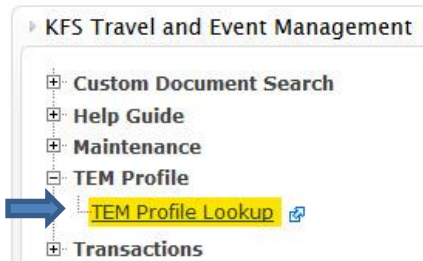
3. Click the **Create New Profile** button in the upper right-hand corner.
 - a. Note: If you do not see this button in the upper right-hand corner, your TEM Profile already exists; there is no further action needed to create a TEM Profile
4. Once you have completed the form and verified that all information 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** ().