

Kuali Test Drive: Screens and User Menu

22 Feb 06

Screen Hierarchy:

Welcome

What is Kuali?

What is Test Drive?

What is in Test Drive?

What is coming in Kuali?

Instructions

Login username/password

Links to documentation

Scenarios with screenshots

Restrictions

Link to User Menu

Feedback / Questions

User Menu

Financial EDocs

Create New Documents:

- ▶ Cash Receipt
- ▶ Transfer of Funds
- ▶ Journal Voucher
- ▶ Disbursement Voucher

Balance Inquiries

- ▶ General Ledger Balance
- ▶ General Ledger Entry
- ▶ General Ledger Pending Entry
- ▶ Balances by Consolidation
- ▶ Available Balances
- ▶ Open Encumbrances
- ▶ Cash Balances

Help

- ▶ Report a Problem - Suggest an Improvement

Lookups

Chart of Accounts:

- ▶ Account
- ▶ Account Type
- ▶ Account Delegate
- ▶ Accounting Period
- ▶ Balance Type
- ▶ Bank
- ▶ Bank Account
- ▶ Campus
- ▶ Chart
- ▶ Country
- ▶ Fund Group
- ▶ Federal Funded Code
- ▶ Home Origination
- ▶ ICR Automated Entry
- ▶ ICR Exclusion by Account
- ▶ ICR Exclusion by Type
- ▶ ICR Threshold
- ▶ ICR Type Code
- ▶ Kuali User
- ▶ Mandatory Transfer Elimination Code
- ▶ Object Code
- ▶ Object Type
- ▶ Object Sub-Type
- ▶ Object Level
- ▶ Object Code Restrictions
- ▶ Object Consolidation
- ▶ Offset Definition
- ▶ Organization Code
- ▶ Organization Options
- ▶ Organization Type
- ▶ Origination Code
- ▶ Postal Zip Code
- ▶ Project Code
- ▶ Reporting Codes
- ▶ Restricted Status
- ▶ Service Billing Control
- ▶ State
- ▶ Sub-Account
- ▶ Sub-Fund Group
- ▶ Sub-Object Code
- ▶ University Date
- ▶ University User

Disbursement Voucher:

- ▶ Payee
- ▶ Payment Reason Code
- ▶ Document Location
- ▶ Wire Charge
- ▶ Travel Company
- ▶ Travel Expense Type Code
- ▶ Travel Mileage Rate
- ▶ Travel Per Diem
- ▶ Non Resident Alien Tax Percent
- ▶ Tax Income Class Code
- ▶ NRA Tax Percent
- ▶ Ownership Type Code
- ▶ Tax Control Code

Contracts & Grants:

- ▶ Agency
- ▶ Agency Type
- ▶ Project Director
- ▶ Subcontractor

Research Administration:

- ▶ Appointment Type
- ▶ Graduate Assistant
- ▶ Non-Personnel Category
- ▶ Non-Personnel Object Code
- ▶ Non-Personnel Sub-Category

Nervous System:

- ▶ Application Constant
- ▶ Financial System Parameter
- ▶ Financial System Parameter Security

Custom Attributes:

- ▶ Extended Attribute
- ▶ Extended Attribute Option