Item Type Automation 2.0

Brought to you by the Offices of Student Accounts & PSI

The Submitter Experience

Enter first few characters of item type usage and select option from the drop-down list of values

Enter PAS description, if applicable

Kuali auto-magically provides:

- Grad Award description
- Active Project Numbers
- Available POET Tasks for a Project
- POET Org
- POET Expenditure
- POET Financial Unit
- NAC
- Entity
- Account
- Check for existing item type

Select funding type

POET: Enter project number & select task
COA: Enter and select Financial Unit

Enter Program & Activity

Confirm item type doesn't already exist

Select Approver & Submit

Submitter Notification

To: carol.morrison@vanderbilt.edu

Subject: Item Type Request Submitted

VANDERBILT UNIVERSITY

Your item type request has been successfully submitted, and the designated Approver will receive an email requesting their action. Upon approval, Graduate Award item types will be available for use the following day. Item types affiliated with the Office of Student Financial Aid require additional configuration and do not have a set availability timeline.

Approved item type information, including item type numbers and current status, can be accessed with PeopleSoft query VU_SF_ITEM_TYPE_REQUESTS. Simply enter your VUNetID when prompted.

If you wish to review or revisit submissions, they are always accessible in the Kuali Document Center .

The Approver Experience

1. Receive email
2. Click the button in the email
3. Review request
4. Click Approve or Deny the **entire request**
5. Confirm choice

From: no-reply@mail.kualibuild.com

To: alison.williams@vanderbilt.edu

Subject: Approval: Item Type Request

VANDERBILT UNIVERSITY

Hello Alison Williams,

Please direct your attention to the item below. In order to review and approve this item type request, please click the "Begin Review" button. Alternatively, you may access any outstanding action requests through your Kuali Actions Dashboard.

Form Name: **ITEM TYPE REQUEST**

Step Name: **FINANCIAL UNIT APPROVAL**

Your Action: **APPROVAL**

Begin Review

Reviewing the Request
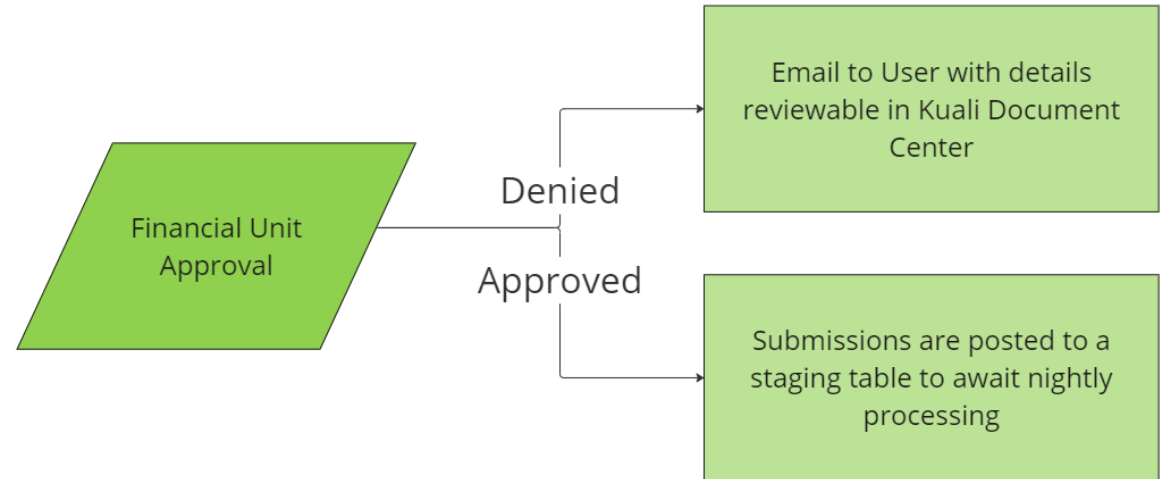
Graduate Award - Graduate Tuition

Description
GRAD TUITION AWARD

COA Fin Unit *	COA Entity	COA NAC	Account	Program *	Activity *
15230	150	05	1223	000	000

Routing

Back   Deny   Send Back   Approve

Financial Unit Approval

Denied → Email to User with details reviewable in Kuali Document Center

Approved → Submissions are posted to a staging table to await nightly processing

Nightly Process

6:30pm
Automated workflow copies approved data into PeopleSoft

6:45pm
PeopleSoft item type security is updated

7:00 pm
Item types available for use in Grad Award Panel. PAS item types available to OSFA for additional setup. Users can obtain item type numbers and availability through a PeopleSoft Query

PeopleSoft Query

Enter VUNetID = MORRC13

View All | Rerun Query | Download to Excel | Download to XML

First ◀ 1-3 of 3 ▶ Last

Row	Requested Date/Time	Processed Date/Time	Requestor	Status	Error	Fin Aid Item Type?	Ready for Use?	Item Type	Description	Entity	NAC	Financial Unit	Account	Program	Activity	POET Project	POET Org	POET ExpType	POET Task
1	03/04/2024 4:33:57PM	03/04/2024 6:30:42PM	morrc13	PROCESSED			Y	000000831002	GRAD INSURANCE AWARD	125	15	12560	1211	000	000	SFP_302581	12560	SHlthInsG	1
2	03/04/2024 4:33:56PM	03/04/2024 6:30:42PM	morrc13	PROCESSED			Y	000000831001	GRAD TUITION AWARD	125	15	12560	1223	000	000	SFP_302581	12560	FAidTG	1
3	03/04/2024 4:30:22PM	03/04/2024 6:30:42PM	morrc13	PROCESSED		Y	N	000000507001	Travel Award for Grad Student	125	10	12530	1223	050	000	FF_210301	12530	FAidTG	60

Item Type Request Form

How many item types are you requesting? (Maximum 10) *	Submitter	Email address *	Department
1	Carol Morrison	carol.morrison@vanderbilt.edu	26400 - Process and Solution Implementations

Instructions

- Only one financial unit/approver is permitted per request.
- Multiple financial units and/or approvers require multiple form submissions
- All fields marked with * are required

Usage Option Definitions

- **Graduate Award** is entered via PeopleSoft navigation: *Student Financials> Graduate Award Panel*
- **Prize/Stipend/Award**
- **FA Grad Award** is entered via PeopleSoft navigation: *Financial Aid> Assign Awards to a Student.*
- **Financial Aid** item types should only be requested by Office of Financial Aid staff

Request Detail 1

Usage *

Type one of the following **case-sensitive** values defined in the **Usage Definition** section above. From the resulting list, select the option that matches the intended usage for this item type

- Graduate Award
- Prize/Stipend/Award
- FA Grad Award
- Financial Aid

Graduate Award - Graduate Tuition ✕

Fund Source *

◉ COA
◯ POET

Usage *

Type one of the following **case-sensitive** values defined in the **Usage Definition** section above. From the resulting list, select the option that matches the intended usage for this item type

- Graduate Award
- Prize/Stipend/Award
- FA Grad Award
- Financial Aid

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Graduate Award - Graduate Audit Fee

Graduate Award - Graduate Insurance

Graduate Award - Graduate Student Health Fee

Graduate Award - Graduate Student Services Fee

Graduate Award - Graduate Transcript Fee

Graduate Award - Graduate Tuition

Graduate Award - Professional Audit Fee

Graduate Award - Professional Insurance

Graduate Award - Professional Student Health Fee

Graduate Award - Professional Student Services Fee

COA Fin Unit *	COA Entity	COA NAC
15230 ×	150	05

Account	Program *	Activity *
	000	000

Approver Routing

Select approver: *

⬍

150 BUE Alison Williams
150 BUE Brigitta Jozefowski
150 BUE Ian Wood
150 BUE Kurt Shepherd
150 BUE Tracey Jackson
15000 FUM Alison Williams
15050 FUM Nour Itani
15100 FUM Alison Williams
15210 FUM Matthew Sevilla
15220 FUM Kaylee East
15230 FUM Nour Itani
15240 FUM Kaylee East
15250 FUM Nour Itani
15260 FUM Nour Itani
15270 FUM Kaylee East
15280 FUM Kaylee East
15710 FUM Matthew Sevilla
15720 FUM Nour Itani
15730 FUM Mary Margaret Sprinkle