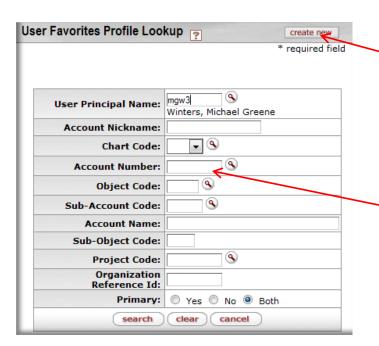As a KFS Favorite Account Manager you have the ability to create and/or edit the favorite accounts for other users.

Locate the link for User Favorite Accounts at the Bottom/center of the KFS Main Menu in the Lookup and Maintenance area.

Lookup and Maintenance

- Disbursement Voucher Travel Company

Global Favorites
- User Favorite Accounts

Vendor

- Vendor
- Vendor Contracts

User Favorites Profile Lookup [?]   create new

* required field

User Principal Name:	mgw3 🔍 Winters, Michael Greene
Account Nickname:	
Chart Code:	▾ 🔍
Account Number:	🔍
Object Code:	🔍
Sub-Account Code:	🔍
Account Name:	
Sub-Object Code:	
Project Code:	🔍
Organization Reference Id:	
Primary:	○ Yes ○ No ⦿ Both

search   clear   cancel

Click create new to start a profile for a new user.

To search for existing profiles, you may User Favorites Profile Lookup? or use the search features such as account number or NetID.

Cornell University

Principal Name:	hmm9
Principal ID:	
Entity ID:	
First Name:	
Middle Name:	
Last Name:	
Email Address:	
Phone Number:	
Employee ID:	
Campus Code:	
Primary Department Code:	
Employee Status Code:	
Employee Type Code:	
Active Indicator:	● Yes ○ No ○

create new

NetID

search   clear   cancel

One item retrieved.

Return Value	Principal ID	Principal Name	Name	Entity ID	Campus Co
return value	1012093	hmm9	Myers, Heather M.	1012093	IT

To search for the profile of a specific user, enter the NetID in the User Principal Name field on the Profile Lookup screen or click on the lookup tool 🔍 to search for a user.

* **User Principal Name:** mgw3 🔍
Winters, Michael Greene

You may search for a user by applying any of the search criteria to the left.

When you locate the person you are looking for click return value. If the user you select already has a profile, KFS will prevent you from creating another one.

User Favorites Profile

● **Errors found in this Section:**
- User Favorites Profile already exists.

Document Overview

* Description:	Creating favorites for hmm9
Org. Doc. #:	

* **User Principal Name:** hmm9
Myers, Heather M.

▼ hide

Account Nickname:	Procurement
* **Chart Code:**	IT
* **Account Number:**	G264700
Account Name:	
Sub-Account Code:	
Object Code:	6550
Sub-Object Code:	
Project Code:	
Organization Reference Id:	
Primary:	☑

add

submit   save   close   cancel

Follow the same process to create favorites for others as you would for yourself.

- Provide a description
- Enter the accounts and any additional information you choose
- Submit.

No approval is required upon submission.

Actions	Person Name	Account Nickname	Account Number	Sub-Account Code	Object Code	Sub-Object Code	Organization Reference Id
edit copy	Myers, Heather M.	Procurement	G264700		6550		

If you want to set up multiple users with the same set of accounts, you may use the copy function.

User Favorites Profile ▾ hide

Original	New Copy
User Principal Name: hmm9 - Myers, Heather M.	* User Principal Name: hmm9 Myers, Heather M.

When you copy a profile, the list of favorites will be created in a new doc and the original user's NetID will appear in both the Original and Copy fields.

Principal Name:	hmm9
Principal ID:	
Entity ID:	
First Name:	Gail*
Middle Name:	
Last Name:	Silvers*
Email Address:	

One item retrieved.

Return Value	Principal ID	Principal Name	Name	Entity ID	Campus Code
return value	1011736	gbs3	Silvers, Gail B	1011736	IT

Export options: CSV | spreadsheet | XML

To update the NetID in the copy field, search for the new NetID and remove the original principal NetID, and select return value.

4

Cornell University

Document Overview ▼ hide

Document Overview

* **Description:** Copying hmm9 favorites to gbs3

Org. Doc. #:

Explanation:

User Favorites Profile ▼ hide

Original

User Principal Name: hmm9 - Myers, Heather M.

New Copy

* **User Principal Name:** gbs3
Silvers, Gail B

▼ hide **Favorite Account**

Original		New Copy	
Account Nickname:	Procurement	**Account Nickname:**	Procurement
Chart Code:	IT	* **Chart Code:**	IT
Account Number:	G264700	* **Account Number:**	G264700
Account Name:	PURCHASING GENERAL OPERATING	**Account Name:**	PURCHASING GENERAL OPERATING
Sub-Account Code:		**Sub-Account Code:**	
Object Code:	6550	**Object Code:**	6550
Sub-Object Code:		**Sub-Object Code:**	
Project Code:		**Project Code:**	
Organization Reference Id:		**Organization Reference Id:**	
Primary:	Yes	**Primary:**	☑

delete

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

submit   save   close   cancel

- Provide the description of who you are a copying from/to

- Click submit

- Receive acknowledgement that the favorites have been created.

  ▪ Document was successfully submitted.

5